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ABSTRACT

This manual is intended as a do it yourself tool for helping organizations develop an approach that will enhance the quality of career counseling services. It is aimed at demystifying evaluation planning and presents a framework so that the evaluation process leads to continuous improvement in meeting client expectations. It also helps validate the qualitative assessment processes used to gather evaluation evidence. Chapters include: (1) "Why is Evaluation Important?" (2) "Evaluation Self-Assessment"; (3) "Developing an Evaluation Policy"; (4) Agreeing on the Evidence"; (5) "Gathering and Assessing the Evidence"; (6) "Summarizing and Acting on the Evidence"; (7) "Reviewing Your Evaluation Approach." (Contain two appendixes, three figures, and nine tables). (Author/JDM)

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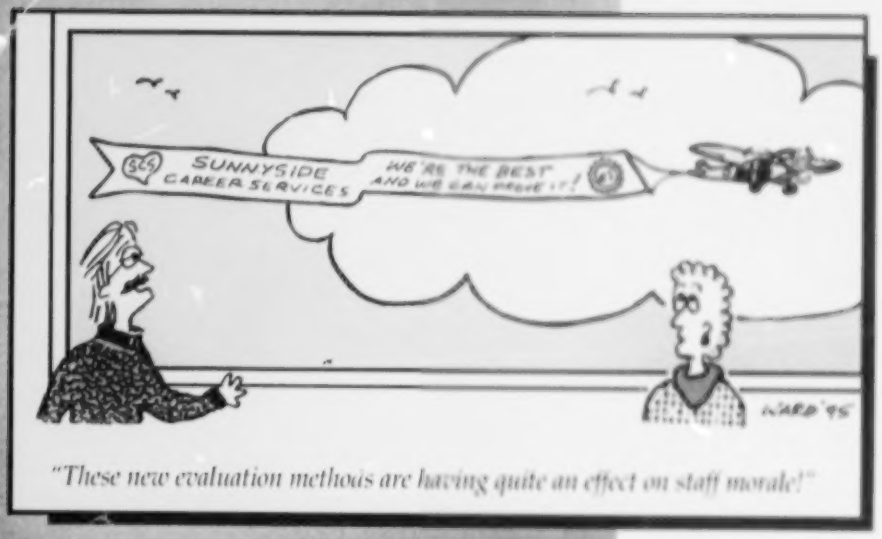
Demonstrating Value

A Career Development Services Evaluation Workbook



"These new evaluation methods are having quite an effect on staff morale!"

Dorothy I. Riddle
Bryan Hiebert

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WELCOME to DEMONSTRATING VALUE

A Career Development Services Evaluation Workbook

Dorothy I. Riddle
Bryan Hiebert

illustrated by Valerie G. Ward

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1995

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About CGCF

The Canadian Guidance and Counselling Foundation (CGCF) was established in 1979 to promote quality and innovation in counselling. To this end, the Foundation has supported research and development, prepares and publishes information relevant to counselling and guidance, and provides for the continuing professional development of practitioners. The success of CGCF initiatives has derived from its active partnerships with community agencies, professional associations, education, government, and industry. Through this collaboration, CGCF has emerged as a leader in improving career education and planning for young Canadians and in the promotion of quality in career development services.

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Foreword & Acknowledgements

We would like to thank everyone who provided comments on the materials developed for this workbook to help enhance its practicality. As with the companion Policy Workbook, "Demonstrating Value" is intended as a "do it yourself" tool for helping your organization develop an approach that will enhance the quality of your services. We have tried to make the process in "Demonstrating Value" sufficiently generic to be useful in a wide range of settings, while providing materials specific to career counselling services. We hope that this Workbook will help you by:

- "Demystifying" evaluation and evaluation planning
- Presenting a framework so that the evaluation process leads to continuous improvement in meeting client expectations
- Validating the qualitative assessment processes you are already using to gather evaluation evidence

Enjoy!

About the Authors

Dr. Dorothy I. Riddle, CMC, is President of Service-Growth Consultants, an international management consulting firm, and has worked with managers from Finland to Singapore on achieving service excellence. Prior to receiving her M.B.A., Dr. Riddle worked for twelve years training community mental health consultants and evaluating community health programs, and served on the Education and Training Board and the Board of Social and Ethical Responsibility of the American Psychological Association. Since 1989, Dr. Riddle has consulted with Human Resources Development Canada (HRDC) on a range of projects related to counselling and employment services, including client-centred programming; training for employment counsellors in performance measurement; and strategic work on a model to support flexible delivery of quality services. Dr. Riddle serves on the Board of Directors of the Institute of Certified Management Consultants of Canada and chairs its ISO 9000 Standing Committee.

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About the Illustrator

Valerie G. Ward works as a Consultant with the Canadian Guidance and Counselling Foundation and has a M.A. in Counselling Psychology. She joined CGCF's CAMCRY initiative in 1990 after nine years of working as a Counselling Consultant with CEIC, in B.C./Yukon Region and at national office, where she was responsible for the development of employment counselling services and for designing and implementing training programs for employment counsellors and supervisors. With CGCF, Valerie has been a professional consultant/advisor to over 20 projects ranging from career education curricula to counsellor training programs, video and interactive videodisc, computer-based projects, and the design of distance delivery programs. She has had a long-term interest in cartooning and finds great pleasure in bringing learning to life through humour.

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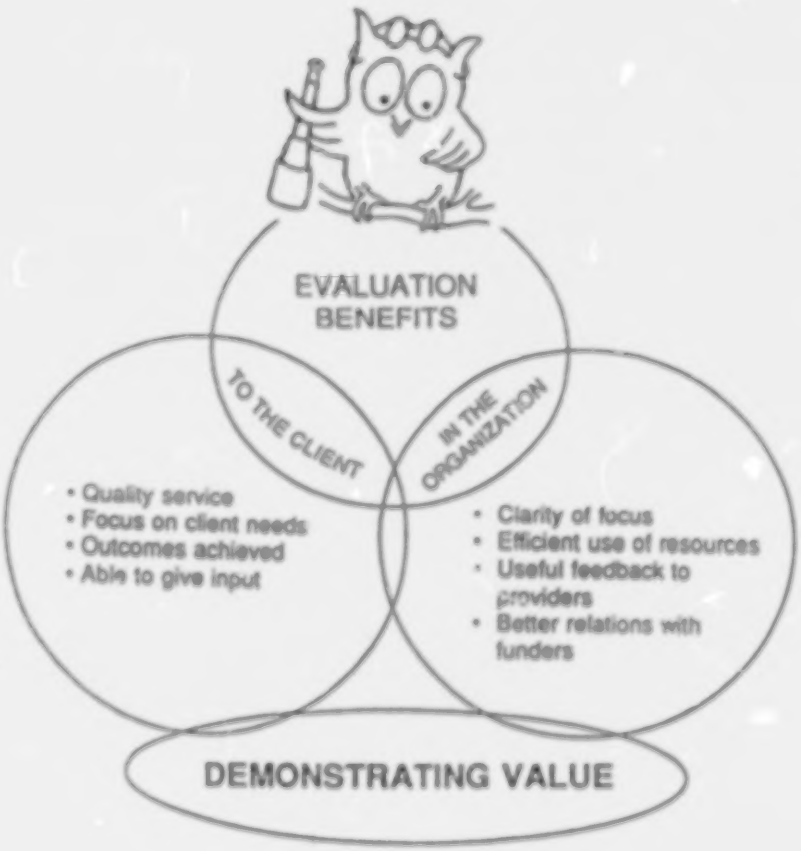
Chapter 1

WHY IS EVALUATION IMPORTANT?



Chapter 1
WHY IS EVALUATION IMPORTANT?

Sunnyside Career Services has a group of well-trained, highly motivated career development counsellors who often get thank-you letters and referrals from former clients. While the counsellors believe that they are providing an excellent service, they have no formal reporting process to prove this. Management reporting practices focus on number of clients seen, types of client problems, number of visits per client, and similar client flow measures. These measures tend to reinforce funder perceptions that the agency has too many counsellors for the number of clients served. As funding gets tighter, funds are being routed to the "leaner" agencies and Sunnyside Career Services is facing a funding crisis. The counsellors are angry as they believe their positive results come from a commitment to resolve client issues rather than "processing" clients as quickly as possible. They don't want to have to turn into a "client mill," but they also want to stay in business. What can they do?

The above scenario, with variations, is being played out across Canada as funding dollars become scarce. Many agencies find themselves ill-equipped to evaluate career counselling systematically, and staff are often intimated by the whole idea of evaluating their work. Many agencies that excel in service delivery have difficulty when it comes to evaluating what they do. Evaluation instruments may not seem relevant to the particular circumstances of the agency or may require inordinate effort to complete. If the results are used only to identify shortcomings and no positive feedback is initiated, staff are likely to become cynical and uncooperative.

Often we talk about "evaluation" as though it were a separate function in career development and counselling — a different task that has to be assigned to someone external. In reality, clients and counsellors are continuously evaluating counselling interventions. The client is trying to determine if the process is being helpful to them, what progress they are making, and whether or not to continue working with the counsellor. The counsellor, in turn, is trying to determine if they are being helpful to the client, what difference the intervention is making, and

whether or not they should be adjusting their actions to increase the likelihood that client outcomes will be achieved. The evaluation data or "evidence" that clients and counsellors generate is often discounted as "subjective" or "anecdotal." But who knows better than the client and counsellor what is actually happening in the counselling process and how well it is working?

Although often approached as an afterthought and "bolted onto the side" of an existing service system, evaluation strategies are an important part of providing quality services to clients. They assess the extent to which client needs are being addressed and how efficiently and effectively an agency is providing client services. When approached appropriately, the evaluation process is an integral part of service delivery and provides constructive feedback to acknowledge what is operating well and to change what is not. Agencies can use results to develop, modify, and/or enhance career development service delivery, as well as to acquire and safeguard funding.

In this workbook, we are proposing a new approach to evaluation ... one that is linked to stakeholder needs and focused on using evaluation to enhance the client learning process. The process outlined is intended to:

a) Create agreement ahead of time as to what evidence will be accepted as demonstrating real value-added

b) Legitimize existing "informal" evidence collection methods by making them systematic and explicit

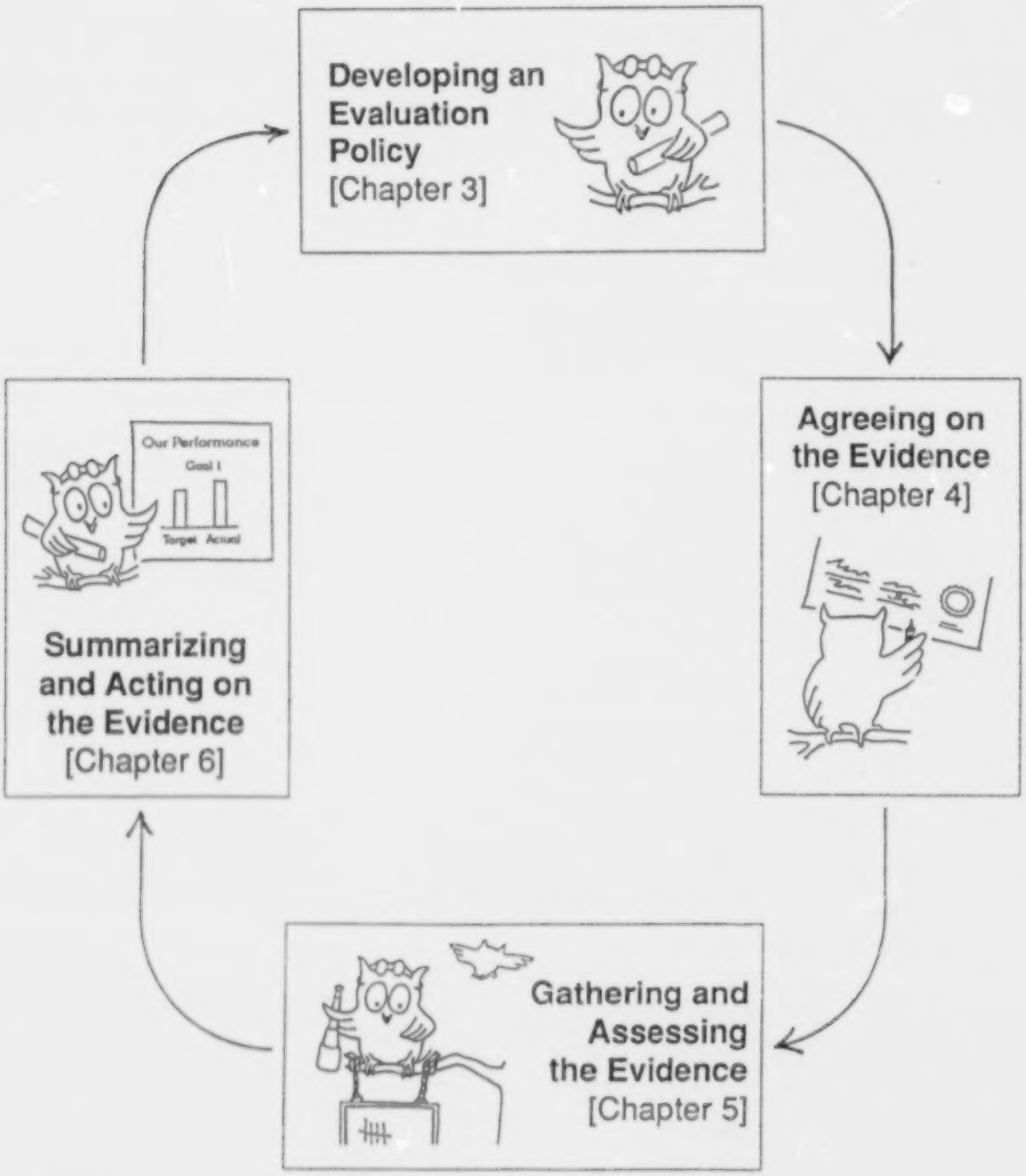
c) Supplement existing "informal" evidence collection so that all stakeholder needs are addressed

d) Design the evaluation process so that it stimulates continuous improvement through an effective feedback loop

e) Provide the basis for giving clients and staff "descriptive praise" — i.e., praise that is specific both about what has been done well, and how that assessment was reached

This workbook is intended to help your agency perform its own internal review, enhance the quality of the services you provide, and demonstrate your own effectiveness to your various publics. The basic model used in the workbook is shown in Figure 1. While the specific application considered in the text is career development services, the same model can be applied in a number of different agency settings such as schools, community agencies, Canada Employment Centres, and educational institutions.

Figure 1
A PROCESS TO DEMONSTRATE VALUE


Developing an Evaluation Policy [Chapter 3]
Agreeing on the Evidence [Chapter 4]
Gathering and Assessing the Evidence [Chapter 5]
Summarizing and Acting on the Evidence [Chapter 6]
Our Performance
Goal 1
Target
Actual

The workbook is designed to provide you with:

- A generic model that you can adapt to your agency
- Feedback that can result in continuous improvement of your services
- Practical tools so that you can achieve specific outcomes
- A context for understanding any evaluation difficulties you may have had
- An approach that will adapt to the changing needs of clients and funders
- Manageable task segments, realistic for busy users

The evaluation process begins in Chapter 2 with a self-assessment so that you can determine for yourself what aspects of the workbook will be most helpful to you. Each of the succeeding four chapters deals with one of the phases in the evaluation accountability framework, ending with a plan of action. Chapter 7 provides you with a master action plan that helps you prioritize the developmental tasks you have identified as important for your agency. Figure 2 provides an overview of the evaluation approach used in this workbook and the contents of each chapter.

We have used the term "evidence," rather than "data," to emphasize that the proof of value comes from many sources — often informal or anecdotal — not just tests. Also, when we use the term "intervention," we intend it to refer to whatever systematic steps an agency takes to facilitate client change ("program", "strategy", "service"). Terminology will vary across the many agencies and professionals using this workbook, depending on the training background of the agency staff, and there is no "best" set of terms. The important point is that "intervention" in this workbook refers to an attempt on the part on an agency to help facilitate client change.

We have tried to make this workbook easy to use by presenting the material in an user-friendly manner, using simple narrative, varied presentation styles, and humorous illustrations. All of the exercises have been "framed" so that your evidence collection is driven by, and responds to, client needs. We have done our best to ensure that the material can be used easily by you in a self-instructional manner without the need for external facilitation or consultation, by providing exercises and examples of alternatives that you can adopt or adapt.

It is our hunch that your agency is already doing a good job of providing client service — and this workbook can help you demonstrate that value to your stakeholders more effectively. Please provide comments and feedback to:

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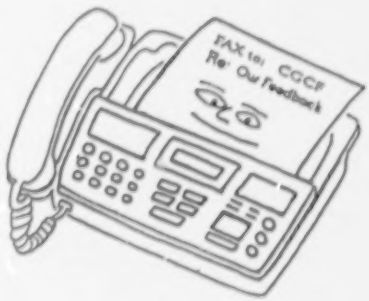


Figure 2
OVERVIEW OF THE EVALUATION APPROACH

EVALUATION SELF-ASSESSMENT
(Chapter 2)

DEVELOPING AN EVALUATION POLICY
(Chapter 3)

- Defining evaluation objectives
  - Stakeholders
  - Activities
  - Benefits
  - Use of Results
- Evaluation types
- Principles
- Communicating
- Action Plan: Developing an Evaluation Policy

AGREEING ON THE EVIDENCE
(Chapter 4)

- Evidence reference points
- Reaching consensus
- Evidence for:
  - Input evaluation
  - Service evaluation
  - Process evaluation
  - Outcome evaluation
- Action Plan: Agreeing on Evidence

GATHERING AND ASSESSING EVIDENCE
(Chapter 5)

- Decisions to be made:
  - Timing
  - For whom?
  - Involving everyone
  - Instrument selection
- Designing instruments
- Assessing evidence
- Analysis options
- Action Plan: Gathering and Assessing Evidence

SUMMARIZING AND ACTING ON THE EVIDENCE
(Chapter 6)

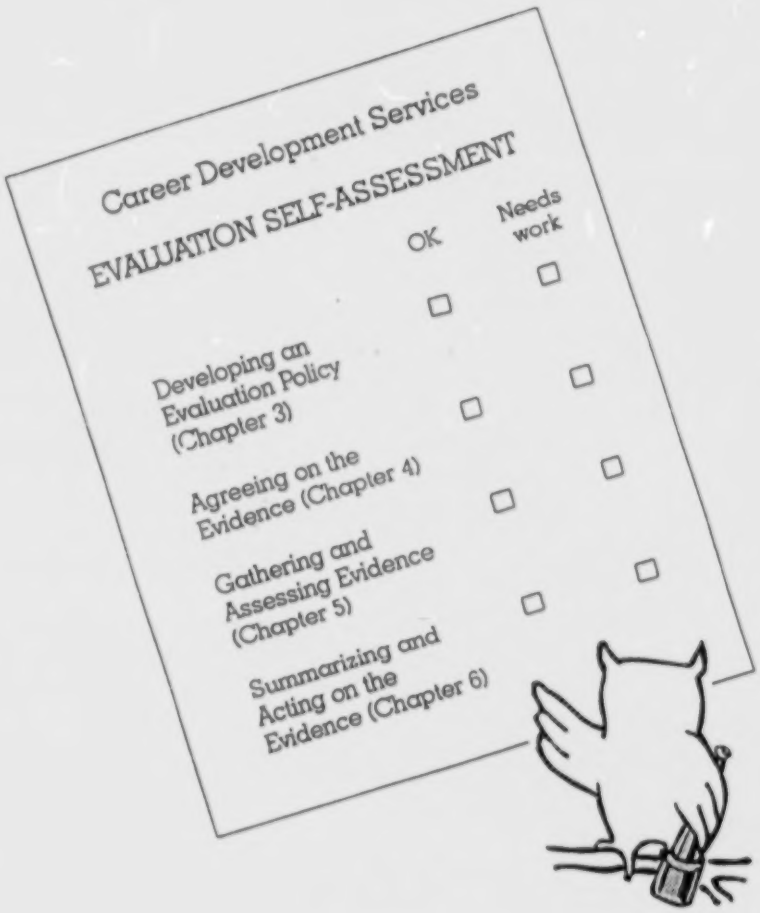
- Reporting strategy focus
- Publicizing results
- Highlighting positives
- Working with negatives
- Reducing staff resistance
- Descriptive feedback
- Action Plan: Summarizing and Acting on Evidence

REVIEWING YOUR EVALUATION
(Chapter 7)

- Revisiting your self-assessment
- Revising your evaluation approach
- Feedback on the workbook

Chapter 2

EVALUATION SELF-ASSESSMENT


Career Development Services
EVALUATION SELF-ASSESSMENT
OK
Needs work
Developing an Evaluation Policy (Chapter 3)
Agreeing on the Evidence (Chapter 4)
Gathering and Assessing Evidence (Chapter 5)
Summarizing and Acting on the Evidence (Chapter 6)

Chapter 2
EVALUATION SELF-ASSESSMENT

The following questions are designed to help you assess your present approach to the evaluation of career development services and determine which aspects you may wish to strengthen or modify.

1. Do you have an evaluation policy?
   - ____ NO (see Chapter 3 for a sample approach)
   - ____ YES

   If **YES**, does your evaluation policy specify:
   - ____ your agency's stakeholders
   - ____ what aspects of agency performance you should evaluate
   - ____ what aspects of service providers' performance to evaluate
   - ____ what aspects of client performance to evaluate
   - ____ what benefits you wish to achieve from evaluation
   - ____ how you should use your evaluation results

   If **YES**, are you satisfied with your evaluation policy?
   - ____ YES, it is accurate and effective
   - ____ NO, it is accurate but could use some revision
   - ____ NO, it needs to be more comprehensive and/or specific

2. Do you have clear principles to guide your evaluation work?
   - ____ NO (see Chapter 3 for sample approach)
   - ____ YES

   If **YES**, do your principles cover:
   - ____ the types of results
   - ____ from whom evidence will be collected
   - ____ the timing of evidence collection

   If **YES**, are you satisfied with your evaluation principles?
   - ____ YES, they are clear and useful
   - ____ NO, they need some revision

3. Do you have an "input" evaluation strategy?
   ____ NO (see Chapter 4.3 for sample approach)
   ____ YES

   If **YES**, is that strategy based on an **agreement with stakeholders** regarding:
   ____ performance baselines
   ____ performance targets
   ____ minimum acceptable performance
   ____ what evidence will be acceptable

   If **YES**, are you satisfied with your input evaluation strategy?
   ____ YES, it works well for us
   ____ NO, it does not address the primary concern of our stakeholders

4. Do you have a "service" evaluation strategy?
   ____ NO (see Chapter 4.4 for sample approach)
   ____ YES

   If **YES**, does that strategy cover:
   ____ service quality factors such as accessibility, timeliness, and responsiveness
   ____ types of clients served
   ____ agency objectives
   ____ agency values

   If **YES**, is that strategy based on an agreement with stakeholders regarding:
   ____ performance baselines
   ____ performance targets
   ____ minimum acceptable performance
   ____ what evidence will be acceptable

   If **YES**, are you satisfied with your service evaluation strategy?
   ____ YES, it works well for us
   ____ NO, it does not address the primary concerns of our stakeholders

5. Do you have a "process" evaluation strategy?
   ____ NO (see Chapter 4.5 for sample approach)
   ____ YES

   If **YES**, does the strategy cover:
   ____ intervention appropriateness
   ____ intervention adherence by the service provider
   ____ intervention adherence by the client

   If **YES**, is that strategy based on an agreement with stakeholders regarding:
   ____ performance baselines
   ____ performance targets
   ____ minimum acceptable performance
   ____ what evidence will be acceptable

   If **YES**, are you satisfied with your process evaluation strategy?
   ____ YES, it works well for us
   ____ NO, it does not address the primary concerns of our stakeholders

6. Do you have an "outcome" evaluation strategy?
   ____ NO (see chapter 4.6 for sample approach)
   ____ YES

   If **YES**, does the strategy cover:
   ____ learning outcomes
   ____ impact outcomes

   If **YES**, is that strategy based on an agreement with stakeholders regarding:
   ____ performance baselines
   ____ performance targets
   ____ minimum acceptable performance
   ____ what evidence will be acceptable

   If **YES**, are you satisfied with your outcome evaluation strategy?
   ____ YES, it works well for us
   ____ NO, it does not address the primary concerns of our stakeholders

7. Do you have a written strategy for systematically gathering evaluation evidence?

____ NO (see chapter 5 for sample approach)
____ YES

If **YES**, does the strategy cover:

____ when the evidence should be collected
____ from whom evidence should be collected
____ how to involve staff in evidence collection
____ which instruments to use

If **YES**, are you satisfied with your evidence collection strategy?

____ YES, it works well for us
____ NO, it is not complete
____ NO, it is not linked to our agreements with stakeholders

8. Do you have a written strategy for systematically assessing evaluation evidence?

____ NO (see chapter 5.3 for sample approach)
____ YES

If **YES**, does that strategy cover how to determine:

____ data usability
____ whether or not the data needs to be coded for analysis
____ the analytical categories to use
____ the kind of statistical analyses to perform

If **YES**, are you satisfied with your evidence analysis strategy?

____ YES, it works well for us
____ NO, it is not complete
____ NO, it is not credible to our stakeholders

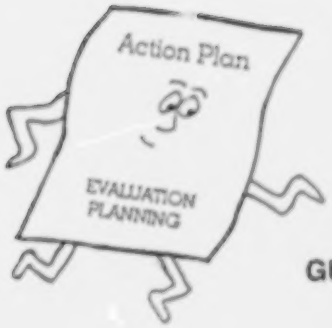
9. Do you have a written strategy for how to report your evaluation results?
   ____ NO (see chapter 6 for sample approach)
   ____ YES

   If **YES**, does that strategy cover:
   ____ how best to summarize the data
   ____ how to communicate the results to external stakeholders
   ____ how to communicate the results to staff
   ____ how to communicate the results to clients
   ____ how to deal with negative results

   If **YES**, are you satisfied with your evaluation communications strategy?
   ____ YES, it works well for us
   ____ NO, it is not complete

10. What priority does your organization place on the evaluation process (check one)?
   ____ Top priority
   ____ High priority
   ____ Moderate priority
   ____ Low priority

11. Are you satisfied with the priority given to evaluation?
   ____ YES, because_____
   ____ NO, because_____



GUIDE FOR EVALUATION DEVELOPMENT PLANNING

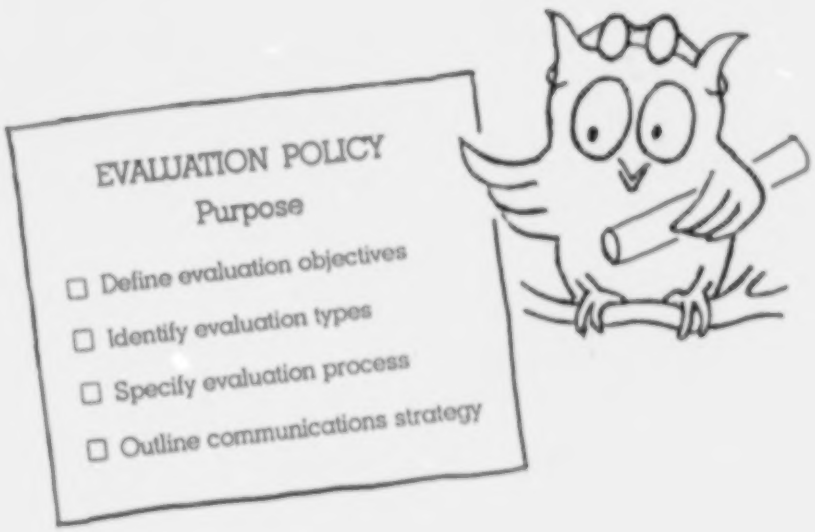
Now that you have completed the "Evaluation Self-Assessment," the following table can help you plan for any policy development work you have identified. First, indicate in column 3 which areas need development work. Then, keeping in mind the time requirement, indicate how high its priority is and when you wish to complete it.

	Chapter/ Discussion	Needed?	Time required	Priority*	Date Scheduled
3	Develop policy	Y N	60 minutes		
4	Agree on evidence	Y N	45 minutes		
5	Gather/assess the evidence	Y N	45 minutes		
6	Summarize/act on the evidence	Y N	45 minutes		

* Priority Ratings:
  1 = Urgent
  2 = Critical, but not urgent
  3 = Desirable, but not critical

Chapter 3

DEVELOPING AN EVALUATION POLICY



Chapter 3
DEVELOPING AN EVALUATION POLICY
[Time Needed: 60 minutes]

3.1 ABOUT EVALUATION POLICIES

Your evaluation policy makes explicit your commitment to yourself, your clients, your funders, and your community regarding how you will demonstrate the value of your career development interventions. It needs to parallel your program and intervention policies.

The purpose of your evaluation policy is to:

- Define your evaluation objectives, including:
  - who your stakeholders are
  - the focus of your evaluation activities
  - benefits to be achieved
  - use of evaluation results
- Identify the types of evaluation to be conducted
- Stipulate how the evaluation approach is to proceed, including:
  - type of results desired
  - evidence collection approach
  - timing of evidence collection
- Describe how the results of the evaluation approach will be used, including:
  - communicating the results to stakeholders
  - using the results for staff and client feedback

The discussions below assume that you already have program policies developed, including a Mandate Statement, identification of your primary client groups, and specification of common client outcomes. If not, you may wish to consult Quality Career Counselling Services: A Policy Workbook (produced by the Canadian Guidance and Counselling Foundation) to help you clarify the important aspects in policy formulation and/or develop such policies. (Note: The checklist in Appendix A, pages 5-7, summarizes the policy factors that are important for quality assurance.)

3.2 DEFINING YOUR EVALUATION OBJECTIVES

Meaningful evaluation depends upon a clear statement of your objectives, the benefits to be achieved, and how the results are to be used. If you don't have a statement of evaluation objectives already, try completing the sample in Work Sheet #1. Each of the "bold" letters is discussed in more detail below, along with its own work sheet.

Work Sheet #1
What Is Your Evaluation Objective?

In collaboration with _____ [**A**: stakeholders] _____, we will establish mutually-agreeable procedures for evaluating _____ [**B**: activities] _____ in order to achieve _____ [**C**: benefits] _____. The evaluation results will be used to _____ [**D**: results] _____.

A Your Stakeholders

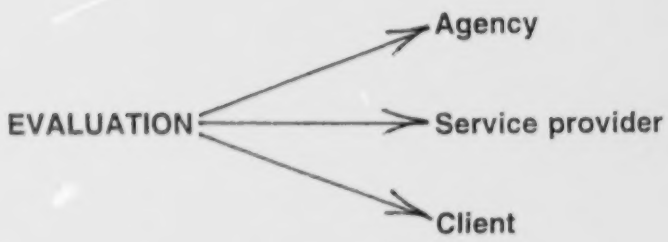
One of the reasons why evaluation appears complicated is that most agencies have different evaluation "audiences," each with slightly different interests. Before you can define your accountability framework, you need to identify your different audiences and clarify what their interests are. In Work Sheet #1A, list the various groups or stakeholders that have a vested interest in how you evaluate your services and what the results are.

Work Sheet #1A
Who Are Your Agency's Stakeholders?

Type of Stakeholder	Specific Stakeholders	Stakeholders' Information Needs
Funders of your services		
Sources that refer clients to your agency		
Your agency's management		
Your agency's career counselling supervisors		
Your agency's service providers		
Your clients		
Community boards & other groups to whom you report		
Other:		

B Focus of Evaluation Activities

Evaluation activities can focus on at least three different levels, each of whose component activities are specified in Work Sheet #1B:



One of the common problems in evaluation is focusing too narrowly, either only on agency resources, service provider time usage, or client outcomes. One or more of them typically gets ignored, making it difficult to detect any link between the impact on the client, the service that was provided, and the service delivery approach. In Work Sheet #1B, check which types of activities you already evaluate and those additional ones that you also want to evaluate.

Work Sheet #1B
What Activities Do You Wish to Evaluate?

	Already	Want to
Your agency's performance:		
Providing appropriate inputs (money, staff)	_____	_____
Efficient use of inputs (money, staff)	_____	_____
Client flow; wait lists	_____	_____
Achieving your agency's mandate	_____	_____
Other: _____	_____	_____
Your service providers' performance:		
Providing quality service	_____	_____
Selecting an intervention appropriate to the client	_____	_____
Adhering to delivery guidelines for the intervention	_____	_____
Other: _____	_____	_____
Your clients' performance:		
Attendance; engagement; homework completion	_____	_____
Achieving learning outcomes	_____	_____
Resolving the original issue(s)	_____	_____
Other: _____	_____	_____

C Benefits to Be Achieved

There are two general types of benefits that will probably be of interest to your stakeholders:

Efficiency	how well you used the resources available to you
Effectiveness	how well you achieved what you promised to achieve

In determining the benefits you want to achieve from a systematic evaluation approach, you will probably want to identify a mix of efficiency and effectiveness measures.

In Work Sheet #1C below, please indicate which benefits your agency wishes to gain from a structured evaluation approach, indicating what benefits you already track and those benefits you wish to add to your tracking system.

Work Sheet #1C
What Benefits Do You Want To Achieve?

	Already	Want to
Efficiency:		
Staff resources per client	____	____
Program dollars per client	____	____
Effectiveness:		
Match staff time to outcomes achieved	____	____
Match dollars spent to outcomes achieved	____	____
Global Benefits:		
Demonstrate "value" to funder	____	____
Identify the most effective allocation of resources	____	____
Justify increased resourcing	____	____
Identify strengths of staff members	____	____
Provide descriptive feedback to staff	____	____
Identify areas where staff training is needed	____	____
Provide descriptive feedback to clients	____	____
Identify changes to improve client satisfaction	____	____
Other: _____	____	____

D Use of Evaluation Results

The design of your evaluation approach will depend on the uses you want to make of the results. In Work Sheet #1D, please indicate which uses your agency wishes to derive from a structured evaluation approach, again indicating what uses you already incorporate and those uses you wish to add to your evaluation system. Specific communication strategies and ways of using evaluation results are discussed in Chapter 6.

Work Sheet #1D
How Do You Want to Use Your Evaluation Results?

	Already	Want to
Regular public/community report	_____	_____
Regular funder report	_____	_____
In negotiations with funders	_____	_____
Regular management report	_____	_____
In planning process, to modify delivery design	_____	_____
In staff supervision	_____	_____
In staff performance evaluation	_____	_____
In client feedback sessions	_____	_____
Other: _____	_____	_____

3.3 IDENTIFYING THE TYPES OF EVALUATION TO BE CONDUCTED

There are four general types of evaluation that you can conduct:

Input Evaluation	the types of resources your agency has, and how well you use those resources
Service Evaluation	the quality of service provided to clients by your agency
Process Evaluation	the appropriateness and quality of the assistance provided, including adherence to guidelines and clients' willingness to play their role and service providers' delivery methods

Outcome Evaluation — the extent to which agency and client objectives have been met, including what facilitated positive outcomes

Different stakeholders will be interested in different aspects of evaluation, and your evaluation policy should specify what kinds of evidence will be collected to address each interest. Table 3.1 shows the usual link between type of evaluation and the interests of the stakeholders, and Chapter 4 describes ways of approaching each of these areas.

Table 3.1
Link between Evaluation Type and Shareholder Interest

Stakeholders	Results of Evaluation Types			
	Input	Service	Process	Outcome
Funders	✓			✓
Referral sources		✓	✓	✓
Management	✓	✓	✓	✓
Supervisors		✓	✓	✓
Service providers		✓	✓	✓
Clients		✓		✓
Community Boards				✓

3.4 PRINCIPLES FOR YOUR EVALUATION APPROACH

A common reason for loss of program support from funders or community groups is a lack of consensus on the parameters to be used for program evaluation. You may feel that your work is excellent and that clients are really benefitting, based on the evidence you have compiled. Your funder might be looking at other "evidence" though, even evidence that you think is not important, and decide that your work is unsatisfactory.

In order to get concurrence from other groups that you are doing a good job, they must have agreed with you on what evidence will demonstrate success ... and it is best to get that agreement before a program begins. Your evaluation policy should specify how you will go about this. To make sure that all parties are "on side," indicate in Work Sheet #2 the principles

you want to establish as part of your evaluation policy. Chapter 5 provides specific strategies for developing each area.

> *EXAMPLE: Sunnyside Career Services works with women re-entering the work force and has been able to place 90 percent of program participants within 12 months of program start. If their funder expects 80 percent placement within 15 months, that funder will be very pleased with their results. If their funder expects 90 percent placement within 8 months, however, that funder will NOT be pleased.*

Work Sheet #2
What Is Your Evaluation Approach?

Approach	Stakeholders Agree?
Type of Results Desired	
____ Discrete action/outcome by a specific time	Yes No
____ Measurable change over a specific time	Yes No
____ Other: _____	Yes No
Evidence Collected From: All Clients Selected Clients	
Input evaluation data ____ ____	
Service evaluation data ____ ____	Yes No
Process evaluation data ____ ____	Yes No
Outcome evaluation data ____ ____	Yes No
	Yes No
Timing of Evidence Collection	
Fiscal year data collected (*check all that apply*):	
____ monthly	Yes No
____ quarterly	Yes No
____ annually	Yes No
____ other: _____	Yes No
Client-activity data collected (*check all that apply*):	
____ before any intervention	Yes No
____ during intervention, linked to tasks	Yes No
____ during intervention, at intervals	Yes No
____ at the end of the intervention	Yes No
____ 3 months after termination	Yes No
____ 6 months after termination	Yes No
____ 12 months after termination	Yes No
____ other: _____	Yes No

3.5 COMMUNICATING THE RESULTS OF THE EVALUATION

Evaluation can only help your agency demonstrate value if the appropriate people know the results. Communicating results properly involves:

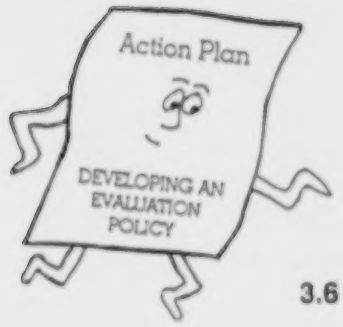
- Clarifying the information needs of stakeholder groups [see Work Sheet #1A]
- Providing them with relevant information in a format that they understand and find appealing

It may also involve more widespread publicity such as informing the media or professional newsletters about your successes.

You will find that it is important to become proficient at recognizing positive results and comfortable with publicizing them. It will be helpful as well to use your evaluation results to provide staff and clients with specific information about their progress, and as the basis for reviewing the programs your agency offers with a view to making them more effective. Finally, it will be important to have a strategy for dealing with those cases where the evaluation results are not as positive as you would like them to be. All of these factors should be covered in your evaluation policy. Table 3.2 summarizes some of the types of issues that a communication policy should address, and more specific strategies are given in Chapter 6.

Table 3.2
Content Issues for a Communication Policy

Target	Type	Who	When
• funder • equity group • MP • newspaper • supervisor • client • counsellor	• report • briefing note • personal visit • press release • verbal report	• manager • counsellor • PR officer	• annually • at end of project • every 6 weeks



3.6 IMPROVING YOUR EVALUATION PLANNING
Work Sheet #3

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Chapter 4

AGREEING ON THE EVIDENCE

Chapter 4
AGREEING ON THE EVIDENCE
[Time Needed: 45 minutes]

4.1 REACHING CONSENSUS

To make sure that your evaluation results will be meaningful to your stakeholders, you need to agree with them on what evidence will be considered relevant and acceptable and how that evidence will be interpreted for each type of evaluation. So you will need to be achieving consensus repeatedly with other interested parties (funders, internal staff, etc.) on baselines, targets, and minimum acceptable evidence. Sometimes that consensus will develop naturally, and sometimes it is difficult to achieve. Here are some tips that may be helpful when consensus is difficult:

- Identify the pros and cons of each proposed alternative and seek consensus on those factors.

- Invite each party to stipulate what they feel they would lose by acceding to one or another option. Then see if you can propose an alternative that is "win-win."

- Remind the group that consensus does not mean 100 percent agreement by everyone; rather, it means developing various options and agreeing on one of them that everyone can live with.

It is important to be quite specific in these deliberations. If the evidence is described in very general terms, it will be easy to get consensus. However, the risk in describing evaluation in general terms is that when the evidence is presented, some of the stakeholders may feel that it is not what they expected or agreed to. This creates a messy situation that can be avoided if the evidence is described in specific terms initially. Sometimes it is useful to summarize the negotiations in check list form, using a variation on the theme presented on pages 1, 2, and 3 in Appendix A.

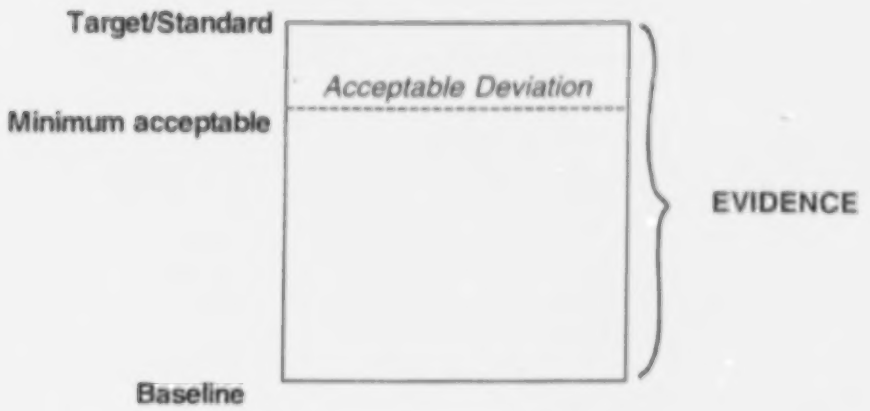
4.2 EVIDENCE REFERENCE POINTS

It is useful to have three reference points for each type of evaluation (see Figure 2). All parties responsible for the evaluation process will need to agree on each of these three points:

Baseline	the "starting point" or "comparison point" for the evidence that is gathered.
Target/standard	the desired level of performance ... the outcome that you are hoping for, or the service standard you want to achieve
Minimum acceptable level	the lowest acceptable performance, below which the evaluation report would say "not acceptable."

From the second and third points, you can calculate the "acceptable deviation," or the difference between the *minimum acceptable level* and the *target/standard*. In some instances, the acceptable deviation may be "zero"; in others, the size of the acceptable deviation will describe the range of performance that demonstrates a successful outcome.

Figure 3
Model of Evidence Reference Points



4.3 EVIDENCE FOR INPUT EVALUATION

Input evaluation looks at your agency's performance from the perspective of what has been made available to support career development activities, both "resources" and "mandates." "Resource" input items include staff, money, equipment, and facilities. Indicate in Work Sheet #4 for this fiscal

year the level of resource commitment that you have for career development services.

Work Sheet #4
Resource Input Baseline Data

Qualified staff ____ full-time equivalents (FTE)
Program dollars $_____

Number of clients your agency is expected to service: _____
Number of FTE hours available* for client service (annual): ____

* ***ALERT:*** *Be careful that you are realistic about the amount of staff time that will be available to do direct client work. Once you subtract time for holidays, sick leave, and training days, you also need to deduct time for:*

- *staff meetings*
- *supervision*
- *networking*
- *client advocacy*
- *consultation/coordination*
- *collaboration with partners*

and so forth. One counsellor probably has no more than 100 hours a month available for seeing clients and performing related professional activities (consultation, coordination, advocacy, etc.).

"Mandate" input items include agency objectives or priorities and agency values. After reviewing your agency's policy statement about your "mission" or "mandate," list in Work Sheet #5 your agency's key objectives with regard to career development services and the key values that you want to permeate the agency and influence service to clients. Then list the types of evidence that you will collect to measure the implementation of these mandate items.

You will need to reach consensus between management and any external funders first on the type of measures you will report. After reviewing the list of possible forms of measures in Work Sheet #4, use the first column to check the ones that will be of most relevance to your stakeholders (referring back to Work Sheet #1A). For each one that you check, you will need to reach consensus on three factors:

Work Sheet #5
Mandate Input Data

Mandate Items	Evidence of Performance
Agency Objectives 1. 2. 3.	
Agency Values 1. 2. 3.	

Baselines
Make sure everyone will be using the same starting point to measure any improvements in performance by indicating on Work Sheet #6 the baseline for each variable you plan to measure. These baseline figures might be, for example, your agency's performance in the previous fiscal period, or the average performance for agencies similar to yours.

Targets/Performance Standards
For "resource" inputs, indicate in Work Sheet #6 the agreed resource usage targets in ratios, percentages, and/or changes over time).

For "mandate" inputs, indicate in Work Sheet #6 the degree to which you are already effective and what you will target as your performance, using a rating scale such as:

"Terrible"	objectives not met; value not apparent
"Poor"	objectives partially met; value somewhat obscure
"Average"	objectives mostly met; value somewhat apparent
"Good"	objectives met; value apparent most of the time
"Excellent"	objectives exceeded; value consistently high

Appendix A contains sample forms and checklists that can be used in evaluating services. The convention in all of these forms is to decide first if the factor is acceptable or unacceptable, and then to assign a rating that indicates how acceptable or unacceptable.

If you are working with clients who face a number of employment barriers, you need to be careful that you do not agree to a target that is unrealistic. For example, you may wish to propose measures "per barrier," for example:

Program dollars spent per employment barrier
Number of staff hours per employment barrier

"BE CAREFUL WHAT YOU PROMISE TO DELIVER, AND DELIVER WHAT YOU PROMISE"

Minimum Acceptable Level

Indicate in Work Sheet #6 the lowest acceptable level of, or improvement in, performance for resource utilization. (In instances where it is mandatory to reach the target, the minimum acceptable level and the target would be the same.)

Use the final column to indicate whether or not you have reached consensus with your shareholders on the various evaluation criteria.

Work Sheet #6
Input Evaluation Planning*

"✓"	Acceptable Evidence	Evaluation Criteria			Stakeholders agree?
		Baseline	Target	Minimum Acceptable	
___	Number of clients per FTE staff [# clients/# FTEs]	_____	_____	_____	Yes No
___	Average amount of time per client [FTE hours/# clients]	_____	_____	_____	Yes No
___	Program dollars spent per client [dollars/# clients]	_____	_____	_____	Yes No
	Percent of staff time on:				
___	client work	_____	_____	_____	Yes No
___	consultation	_____	_____	_____	Yes No
___	client advocacy	_____	_____	_____	Yes No
___	networking	_____	_____	_____	Yes No
___	coordination	_____	_____	_____	Yes No
___	collaborating	_____	_____	_____	Yes No
___	supervision	_____	_____	_____	Yes No
___	professional development	_____	_____	_____	Yes No
	Agency objectives:				
___	1._____	_____	_____	_____	Yes No
___	2._____	_____	_____	_____	Yes No
___	3._____	_____	_____	_____	Yes No
	Agency values:				
___	1._____	_____	_____	_____	Yes No
___	2._____	_____	_____	_____	Yes No
___	3._____	_____	_____	_____	Yes No
___	Other: _____	_____	_____	_____	Yes No

* To help make input evaluation more explicit, it is often useful to develop a form like that in Appendix A, page 4, in conjunction with funders and other stakeholders.

4.4 EVIDENCE FOR SERVICE EVALUATION

While funders are concerned about whether or not they are "getting their money's worth" (input evaluation), clients are concerned about how well the service delivery system works for them. Clients' perceptions of high service quality and their overall satisfaction depend both on the assistance they get from service providers and also on other aspects of agency functioning (such as accessibility of services, timeliness, and treatment by reception staff).

Once again, your first step needs to be to form consensus on the types of evidence that will be acceptable to demonstrate how well your service is being delivered by agreeing on which items to measure and then on the evaluation criteria (using Work Sheet #7).

Baselines

Each of the factors listed is one of the variables that we know matters to clients in terms of their satisfaction with your services. Assess your present performance in order to establish a baseline, and enter it in Work Sheet #7.

Targets/Performance Standards

Set your targets in Work Sheet #7 at a level that your agency can reasonably expect to meet, considering the level at which various functions are resourced.

Minimum Acceptable Level

For all four service quality categories, specify what deviation from your targets (if any) would be acceptable. For example, is some improvement in and of itself acceptable, or do you need to achieve the targets set?

Work Sheet #7
Service Evaluation Planning*

"✓"	Acceptable Evidence	Evaluation Criteria			Stake-holders agree?
		Baseline	Target	Minimum acceptable	
	Accessibility				
___	Services available: ___ Regular hours ___ Extended hours	_____	_____	_____	Yes No
___	% time phone busy	_____	_____	_____	Yes No
___	Physical accessibility	_____	_____	_____	Yes No
___	Materials in alternate formats (e.g., large print, audio)	_____	_____	_____	Yes No
	Timeliness				
___	% calls answered by ring 3	_____	_____	_____	Yes No
___	Average days wait between referral and assistance	_____	_____	_____	Yes No
___	Average minutes delay in office before clients are seen	_____	_____	_____	Yes No
	Responsiveness				
___	Respect from staff	_____	_____	_____	Yes No
___	Courteous service	_____	_____	_____	Yes No
___	Helpful service	_____	_____	_____	Yes No
___	Clear communication	_____	_____	_____	Yes No
___	Client confidentiality	_____	_____	_____	Yes No
	Overall Satisfaction				
___	% rating service "good" or "very good"	_____	_____	_____	Yes No
___	% of referrals from former clients	_____	_____	_____	Yes No
___	**Other:** _____	_____	_____	_____	Yes No

* In measuring service quality, it is critical to get specific client feedback. See Appendix A, pages 8-12, for examples of forms that you may wish to develop.

4.5 EVIDENCE FOR PROCESS EVALUATION

Process evaluation focuses on the appropriateness of the intervention (service or program) selected and the manner in which that intervention is performed, in three areas:

Intervention appropriateness

Which interventions are best suited to achieving specified outcomes with particular clients

Intervention adherence by service providers

How particular interventions should be implemented, and when customization is critical

Intervention adherence by clients

What behaviours are necessary from the client in order for the intervention to be successful

On Work Sheet #8, you first need to check the categories of evaluation that management (including supervisors) and service providers will accept as relevant. Then you need to agree with your stakeholders as to the evaluation criteria.

Baselines

In Work Sheet #8, enter your assessment of average service provider and client performance at the present time. Typically for the work of trained service providers, baseline performance and standards of performance will be the same. If you know at the outset that service providers are not performing up to standard, then either you will need to build in the appropriate training during the measurement period or you will need to lower your expectations of minimum acceptable performance. For clients, your baseline for intervention adherence should reflect the average behaviour of your clients prior to any assistance.

Targets/Performance Standards

For service providers that have received appropriate training plus ongoing supervision, your targets should reflect adherence to common professional standards of practice. For your targeted clients, you will need to determine what is realistic to expect by way of intervention adherence.

Work Sheet #8
Process Evaluation Planning*

"✓"	Acceptable Evidence	Evaluation Criteria			Stake-holders agree?
		Baseline	Target	Minimum acceptable	
	Intervention Appropriateness				
___	Assesses client's needs	____	____	____	Yes No
___	Matches client needs to intervention	____	____	____	Yes No
___	Refers client to others if appropriate	____	____	____	Yes No
	Intervention Adherence by the Service Provider				
___	Follows standard guidelines	____	____	____	Yes No
___	Adapts intervention to address barriers faced by the client	____	____	____	Yes No
	Demonstrates ability to:				
___	explain new skill	____	____	____	Yes No
___	demonstrate skill	____	____	____	Yes No
___	create skill practice	____	____	____	Yes No
___	provide descriptive feedback	____	____	____	Yes No
___	facilitate skill transfer	____	____	____	Yes No
	Intervention Adherence by the Client				
___	Keeps appointments	____	____	____	Yes No
___	Follows groundrules	____	____	____	Yes No
___	Engages in skills practice	____	____	____	Yes No
___	Completes homework	____	____	____	Yes No
___	Sustains motivation	____	____	____	Yes No
___	Willing to self-examine	____	____	____	Yes No

* If you do not already have procedures for evaluating process variables, see sample checklists in Appendix A, pages 13-19.

Minimum Acceptable Performance

Typically for the service provider's behaviour, the standards of practice and minimum acceptable level are identical — i.e., providers are expected to have the professional training to identify correctly the most appropriate intervention(s) and execute them correctly. Of course, practitioners will tailor any given intervention or program to their own style, but at some point the "tailoring" might be so extensive that the resulting program bears little resemblance to the original game plan. Also, there is an accepted format for most interventions that have been field tested. When the changes (or tailoring) become too great, the result is a new program that cannot use the original positive field test results to justify an expectation for success. The question is "how much latitude are supervisors (and managers, funders, stakeholders, etc.) willing to allow before they will say the program being delivered is not the one that was intended?"

A similar case can be made for client program adherence. How much leeway are service providers willing to accept, before they say that the clients are not doing their part in the intervention. For example, how diligent does a client need to be in completing assigned homework on time — 50 percent of the time? 90 percent?

4.6 EVIDENCE FOR OUTCOME EVALUATION

Outcome evaluation focuses on how well clients have achieved their goals and objectives. Typically, outcome targets are negotiated with the client before beginning a counselling intervention (or at the start of a program) by clarifying what it is they want to achieve. At the present time, do you routinely establish outcome targets with your clients:

____ NO, we do not negotiate outcome targets with clients
____ YES, we negotiate (*check as many as apply*):
____ achievement of client's overall goals
____ achievement of client's learning objectives
____ change in client's employment status
____ other consequences in client's life

When thinking about outcomes, it is useful to distinguish between more immediate client learning outcomes and those outcomes that might have a more long-term "life impact" for the client. For example, a client might learn job interview skills (a learning outcome) in order to increase the chances of getting a job offer (an impact outcome).

EXAMPLES

Learning Outcome	Impact Outcome
• conflict resolution skills	• reduce the number of arguments on the job
• communication skills	• get along better with work colleagues
• positive self-talk skills	• become more self-confident

Typically, agency programs are directed at helping clients achieve learning outcomes. They have a difficult time promising to achieve the life-impact (or socio-economic impact) outcomes of concern to clients because they do not have control over all of the factors that influence the larger picture. Therefore, the most relevant type of outcome targets for evaluation purposes are client learning outcomes as those objectives are the ones upon which your agency's interventions can have the most direct impact.

Before you finalize your outcome evaluation approach; you will want to be sure that you are evaluating work with your priority clients as specified in your agency's policy mandate statement. You may wish to categorize clients by demographics or by client characteristics such as:

- Motivated to obtain full-time employment
- Receptive to a structured approach
- Emotionally stable
- Medical condition stable
- No substance abuse or medication interference

In Work Sheet #9, you will find an initial listing of both learning objectives and impact outcomes changes that you can expand to include those most relevant to your clients. Based on the types of clients you assist, check the types of learning objectives and impact outcomes are most likely to be of relevance so that you can be prepared to collect evidence on them. Often it is useful to have some ways of quantifying client goals and expectations. The check lists in Appendix A, pages 19 — 36, provide examples of ways to quantify client issues and expectations for a cross-section of potential outcomes.

For outcome evaluation, you will need to collect evidence specific to each client's needs and behaviour — i.e., you will need to complete some form of Work Sheet #9 for each client you assist. You will need to negotiate with clients their ultimate goal — i.e., what it is that they want to change or improve and the knowledge, skills, and/or attitudes that would support that change. Then specify:

Baselines
What level of competence do they have right now with regard to relevant knowledge, skills, and attitudes?

Targets/Performance Standards
What are their specific learning outcomes? Impact outcomes? What sorts of new skills, knowledge, and attitudes are necessary in order for them to reach their goal? What evidence will they accept that those outcomes have been achieved (use Work Sheet #9A)?

Minimum Acceptable Level
How close do they need to come to their targets to be satisfied?

Your evaluation approach will need to allow for the fact that sometimes client needs and objectives shift during the time when they are receiving assistance.

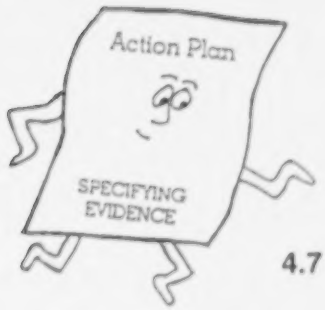
Work Sheet #9
Outcome Evaluation Planning

"✓"	Evidence Needed For:	Evaluation Criteria		
		Baseline	Target	Minimum acceptable
	Learning Outcomes			
__	higher self-esteem regarding work	_____	_____	_____
__	clarity about interests and aptitudes	_____	_____	_____
__	clarity about possible career choices	_____	_____	_____
__	able to balance work & leisure	_____	_____	_____
__	better career decision-making skills	_____	_____	_____
__	better career management skills	_____	_____	_____
__	better skills for transitions	_____	_____	_____
__	better at managing external employment barriers	_____	_____	_____
__	better at accessing labour market information	_____	_____	_____
__	better job search skills	_____	_____	_____
__	improved work habits	_____	_____	_____
__	plan for career development	_____	_____	_____
	Impact Outcomes			
__	employed	_____	_____	_____
__	accepted in training	_____	_____	_____
__	accepted in degree program	_____	_____	_____
__	number of job offers	_____	_____	_____
__	kept a job for ____ months	_____	_____	_____
__	reduced number of conflicts at work	_____	_____	_____
__	better attendance at work	_____	_____	_____

* When developing check lists for counsellors and clients to use, it is important to keep them short and easy to use. For example, the form in Appendix A, page 19, provides a place to document client program adherence, client learning outcomes, and client impact outcomes, plus providing a place to document whether relevant referral criteria have been met. These factors are covered in more detail in Chapter 5 of this workbook and outlined specifically on page 5-15.

Work Sheet #9A
Specifying Learning Outcome Evaluation Evidence

Outcome to Be Measured	Acceptable Evidence	Stake-holders agree?
Higher self-esteem regarding work		Yes No
Clarity about interests and aptitudes		Yes No
Clarity about possible career choices		Yes No
Able to balance work and leisure		Yes No
Better career decision-making skills		Yes No
Better career management skills		Yes No
Better skills for transitions		Yes No
Better at managing external employment barriers		Yes No
Better at accessing labour market information		Yes No
Better job search skills		Yes No
Improved work habits		Yes No
Other:		Yes No
Other:		Yes No



4.7 IMPROVING YOUR EVIDENCE SPECIFICATION
Work Sheet #10

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Chapter 5

GATHERING AND ASSESSING THE EVIDENCE

Chapter 5
GATHERING AND ASSESSING THE EVIDENCE
[Time Needed: 45 minutes]

5.1 THE DECISIONS TO BE MADE

We mentioned at the beginning of this Workbook that evidence is being collected all the time ... so the issue is not starting to collect evidence but rather starting to collect it systematically. In order to create a systematic approach, there are a series of decisions that you will need to make:

A When does evidence need to be collected?

B From whom does evidence need to be collected?

C How can both service providers and clients become motivated to participate more systematically in evidence collection?

D What are the fewest number of instruments that can be used for collecting evidence?

A TIMING YOUR EVIDENCE COLLECTION ACTIVITIES

While evidence may be being collected by clients and service providers all the time, it is not always written down. An accountability framework requires that you develop a systematic approach to recording the evidence that is being collected so that your comparisons between baselines, targets, and actual performance can be explicit.

IDEA

You might want clients to feel that they can "get started right away" by assigning them some baseline evidence collection activities to do before their first appointment. This baseline evidence collection can provide an idea of where the client is starting from and can also be used as a reference point in evaluating the effects of the intervention. Check lists like the ones in Appendix A, pages 26-32, are often useful ways to structure client baseline evidence collection.

If you and your client are interested in evidence on change in the client's behaviour over time, Table 5.1 gives you some ideas of how your client could help collect baseline evidence. Add in your own!

Table 5.1
Examples of Ways to Document Client Changes

Evidence Collection Examples Prior to the Intervention

- Number of job interviews in the two previous weeks
- Charting motivation levels for one week before the intervention
- Charting positive and negative self-talk for one week
- Recording number of arguments with colleagues
- Other:

_____

_____

Evidence Collection Examples Both Before and After the Intervention

- Before-after comparisons by the client on learning objective dimensions [estimated by the client before and after]
- Before-after comparisons by someone who knows the client on learning objective dimensions [estimated before and after]
- Other:

_____

_____

Evidence Collection Examples Only After the Intervention

- After-before comparisons by the client on learning objective dimensions [estimated by the client at termination only]
- After-before comparisons by someone who knows the client on learning objective dimensions [estimated at termination only]
- Ratings of the amount of change experienced on learning objective dimensions
- Other:

_____

_____

Often when beginning clients are asked to estimate how good they are at particular skills, they give inflated estimates, because they do not know what a 'good example' looks like. Then at the end of counselling, when they have a better idea of what is involved, they may rate themselves lower than they did in the beginning. This is

because the reference point has shifted, due to the clients increased knowledge. A person may think they have good communication skills and rate themselves highly on that factor, but if they knew what was involved in good communication, they may well have rated themselves lower.

To get around this problem, it sometimes is useful to ask clients at the end of a program to think back to where they were before the intervention, and, in the light of what they know now about the problem they were working on, how would they rate themselves at the beginning and how would they rate themselves now. We call this "After-Before" comparisons because they occur after the intervention is completed.

Some evidence collection activities are linked to calendar dates and others are linked to phases of client activity (see Table 5.2). For evidence collected from clients, you will need to decide whether or not to collect evidence from clients at any time other than at the end of your work together.

Table 5.2
Timing of Evidence Collection

Type of Evaluation	Timing of Evidence Collection	
	Fiscal Calendar	Client Activity
Input	✓	
Service	✓	✓
Process		✓
Outcome		✓*

* Includes both at termination and on a timed follow-up schedule.

In Section 3.4, you established principles for the timing of evidence reporting. Now you need to decide how frequently you need to be recording particular types of evidence in order to meet that reporting schedule. In Work Sheet #11, check all the options that apply for your strategy with regard to the timing of evidence recording.

Work Sheet #11
TIMING OF EVIDENCE COLLECTION

Fiscal year data to be collected (*check all that apply*):

____ monthly
____ quarterly
____ annually
____ other: _____

Client-activity data to be collected (*check all that apply*):

____ before the intervention starts
____ during the intervention, linked to tasks
____ during the intervention, at regular intervals
____ at the end of the intervention
____ 3 months after the end of the intervention
____ 6 months after the end of the intervention
____ 12 months after the end of the intervention
____ other: _____

B EVIDENCE COLLECTION FROM WHOM?

For some types of evidence like *client outcomes*, you will want to collect information from every client (a "census" or "population" approach). For others such as *service quality*, however, collecting evidence from all clients may be too burdensome. Instead, you will want to get evidence from a representative portion (or "sample") of clients (the "population") — for example, every fifth client.

In Section 3.4, you have already indicated when you want to involve all clients and when you will want to involve only selected clients. When you "sample" only selected clients, you will want to be sure that you have input from enough clients that you can generalize reliably to your client group. If you have chosen a sampling approach for any of your evidence collection, fill in Work Sheet #12 to clarify the types of client groups from which you will want to be sure to collect evidence.

Work Sheet #12
CREATING AN APPROPRIATE CLIENT SAMPLE

The purpose of sampling your clients is to select a small number of clients (giving fewer responses that you have to analyze) from which you can generalize about your services with some degree of confidence. There are two general approaches to sampling your clients so that you can be sure that you are getting a meaningful "microcosm" of all of your clients. Check below which approach will work best for you:

____ **Random Sampling**

Use this approach if your clients are similar to each other in what they need from your agency. You will create a sample by collecting evidence from (*check one*):

____ every ___th client
____ every client during the week/month of _____
____ other: _____

____ **Stratified Random Sampling**

Use this approach if your clients differ in terms of the way in which they need to receive service or the type of interventions (services or programs) that are appropriate. Check below the ways in which your clients vary from one another that could affect the types of assistance that would be meaningful to them:

____ gender (women or men)
____ age (youth, young adults, older workers)
____ ethnicity (aboriginal peoples, visible minorities, etc)
____ presence/absence of disabilities
____ geographic location (urban or rural; parts of the city)
____ level of education (high school, college, trades, etc.)
____ previous work experience (number of years; type)
____ number of employment barriers
____ other: _____

Once you have decided on the client groupings are important for you to be able to interpret the evidence that is reported, then determine the relative proportion that you should have (e.g., every third person from each group):

____ representative proportion from each subgroup based on_____

NOTE: In some instances, an equal number from each subgroup may meet your needs.

C INVOLVING EVERYONE IN EVIDENCE COLLECTION

In order to collect meaningful evidence, you will need the cooperation of both staff and clients. Please indicate in Work Sheets #13 (staff) and #14 (clients) what steps you are already taking and what ones you would like to begin. Please note that clients will need to know in advance how they will be expected to gather evidence, and any reluctance they may have will need to be resolved.

Work Sheet #13
WAYS TO INVOLVE STAFF

Options	Already	Want to
Each staff member's role in evaluation is specified in their job description	____	____
Staff members receive training in their evaluation role(s)	____	____
Staff members' work plan includes time for evaluation activities	____	____
Staff members' evaluation activities are acknowledged in agency reviews	____	____
Staff members receive positive feedback as a result of your agency's evaluation activities	____	____
Staff members receive briefings on the overall evaluation results of your agency	____	____
Other: _____	____	____

Work Sheet #14
WAYS TO INVOLVE CLIENTS *

Options	Already	Want to
Set learning objectives together in the first interview	____	____
Document progress towards learning objectives regularly	____	____
Document any changes in a client's learning objectives when that change occurs	____	____
Provide clients with written service standards	____	____
Clients' role in evaluation is specified for them in writing	____	____
Clients' role in evaluation is reviewed as part of the initial interview	____	____
Clients receive orientation/training for any data collection requested of them	____	____
Clients' completion of evaluation activities is acknowledged in agency reviews and/or through thank you letters	____	____
Before completing an intervention, clients' progress is reviewed with them in the context of their learning objectives	____	____
Clients are assured of confidentiality regarding their evaluation activities	____	____
Other: _____	____	____

* Sometimes service providers have difficulty discussing evaluation with clients in an open and forthright manner. Often a simple check list like the one in Appendix A, page 3-8, will help provide the incentive necessary to motivate service providers to raise these important issues explicitly with clients.

D SELECTING THE MINIMUM EVIDENCE COLLECTION INSTRUMENTS

There are a number of different techniques that can be used to collect client data, depending on the purpose of the evaluation (see Table 5.3). In order to reduce the evidence collection burden, you will want to use the fewest number of instruments or approaches that can still provide the evidence on baselines and targets that you need.

Table 5.3
Alternate Evaluation Techniques

Type of Evaluation	Evidence Provided By:		
	Administrative staff	**Service providers**	**Clients**
Input	Enumeration Interview Report analysis	Interview Questionnaire	Interview Questionnaire
Service			Questionnaire
Process: Intervention appropriateness		Checklist Interview	Checklist Interview
Intervention adherence		Observation grid Self-report Interview	Observation grid Practice log Interview
Outcome		Questionnaire Checklist	Self-assessment Questionnaire Standardized test

Explanations of instruments are given in Appendix B, and examples of various types of instruments are given in Appendix A, pages 19-36.

5.2 DESIGNING YOUR OWN EVALUATION INSTRUMENT

It is quite easy to design evaluation instruments specific to your agency provided that you keep in mind some basic design tenets (see Table 5.4) so that the results will be credible. A "good" instrument means one whose results are consistent and acceptable:

Consistency	If two people collected the same evidence, they would get approximately the same results.
Acceptability	Funders, managers, service providers, and clients will all find the results meaningful.

Each of the different types of evaluation instruments has advantages and disadvantages. These are summarized in Table 5.5 to help you with your selection.

Table 5.4
Characteristics of a Good Evaluation Instrument

- Use simple language
  [*"how much did you get..." rather than "how much did you acquire..."*]
- Use specific, behaviourally-based measures
  [*"how much do you actually...?" rather than "how do you feel about your ability to ..."*]
- Word items neutrally so that a particular response is not suggested
  [*"to what extent did you..." rather than "you didn't..., did you?"*]
- Specify alternative responses where possible, keeping open-ended questions to a minimum
  If you specify alternatives, first collect possible responses from a group of staff/clients using an open-ended question. When using an open-ended question, develop a scoring grid (based on people's response) to record and group the answers you get back.
- Use alternatives along a continuum if possible, rather than dichotomous choices
  [*"how much has your self-confidence improved?" rather than "has your self-confidence improved?"*]
- Include an "other" category to capture unanticipated responses
- Make sure each item focuses on a single element
- Frame questions in a positive form
- Make sure that it takes less than 10 minutes to complete
- Pre-test with clients it to make sure that the items are clear

Table 5.5
Comparison of Different Types of Evaluation Instruments

Type	Advantages	Disadvantages
Enumeration/report analysis	- Low initial cost - Easy to analyze	- Data needed may not be available
Experimental procedure	- Provides explicit connection between intervention and results	- Time consuming to set up - May require training staff in the research methodology
Interview	- Low initial cost - Does not assume literacy - Direct contact with participants - Ensure correct interpretation of questions	- May require training of interviewers - May be time consuming to administer - Data difficult to analyze for "open-ended" questions
Log (practice; monitoring)	- Low initial cost - Easy to construct - Can trace trends over time - Can obtain detailed responses	- Assumes literacy - Requires ongoing motivation to respond - Data time consuming to analyze
Observation grid	- Low initial cost - Data collection customized to your objectives	- May require training of observers - May be time consuming to administer - May be time consuming to analyze data

Table 5.5 (continued)

Type	Advantages	Disadvantages
Questionnaire:		
Constructed	- Low initial cost - Customized to your objectives	- Time needed for construction - Data difficult to analyze for "open-ended" questions - Cannot compare results to those for other agencies
Standardized	- Easy to analyze - Immediately available	- Can be expensive to purchase - Questions may not relate specifically to your objectives
Self-report	- Low initial cost	- Quality of data depends on the degree of self-awareness of the respondent - Data time consuming to analyze

5.3 ASSESSING THE EVIDENCE COLLECTED

Once you have all the evidence collected for a particular reporting period, you will need to separate it into "baseline" and "target" evidence and then analyze it to determine what is really being said. Table 5.6 lists for you types of questions you can ask of the evidence.

Table 5.6
Questions to Guide Your Assessment of Evidence

1. **Is all of the evidence collected usable?**
   You need to review the evidence to make sure each set of responses is complete and relevant. Discard incomplete responses or ones that are clearly nonresponsive.

2. **Does any of the evidence need to be coded?**
   If you have collected responses to open-ended questions, those responses will need to be coded (grouped into categories and tallied) so that they can be analyzed.

3. **Are there differences in response among different types of clients?**
   If there are noticeable differences, you will need to report the evidence by category of client. If there are not noticeable differences, you can report the evidence for all clients grouped together.

4. **Does the significance of any differences need to be analyzed?**
   In most instances, your stakeholders will be satisfied with simple frequency counts and ratios. In some instances, though, stakeholders will want to know how much they can rely on a particular result, in which case you will need to perform statistical analyses on the data.

5.4 EVIDENCE ANALYSIS OPTIONS

For each of your evaluation approaches, there are several different ways to analyze the evidence that has been collected. Please indicate which you currently use:

____ number/percent at a particular point in time
____ change in number/percent over time
____ comparison of number/percent with population data
____ deviation of data evidence from a standard
____ other: _____

Depending on the interests of your stakeholders, you may simply report the evidence in formats such as those listed above or you may need to determine statistically:

- How "significant" the comparison is between your baseline data and evidence of actual performance
- How close you have come to achieving your target(s)

NOTE

If you need to do statistical analyses, you will need to use non-parametric statistical techniques (such as Chi-square) when you are dealing with frequencies or evidence that has been placed in categories (e.g., number of clients completing program). Parametric techniques (such as t-tests or Analysis of Variance) are used when the responses represent points on a continuum (e.g., average response of a group of clients on a 5-point scale or scores on a standardized test).

There are two basic approaches to data interpretation if you need to use statistical analysis: the most likely response (central tendency), and the range of response (dispersion). If you want to know the most likely occurrence, then you want to use one of the following:

Average

Add up all the responses and divide by the number of respondents

Mode

Pick the most common response

If you want to know how much variability there was among respondents, then you want to use one of the following:

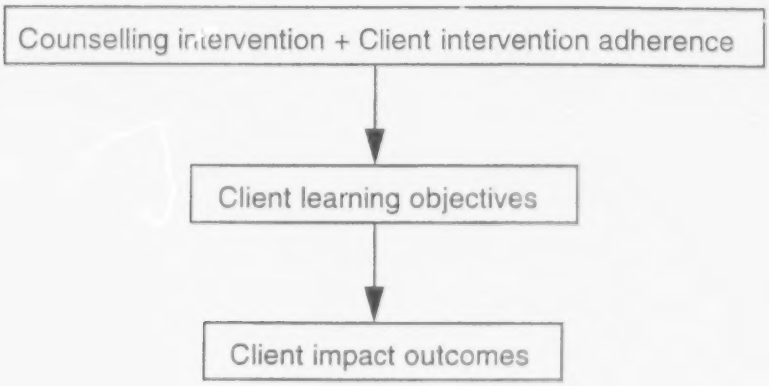
Range

Report the highest and lowest responses

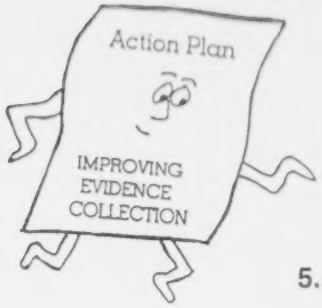
Standard deviation

Calculate statistically what percent of respondents' answers were within 68 percent (1 S.D.) or 96 percent (2 S.D.) of the average (mean).

If you wish to determine which interventions are most likely to produce given client outcomes, you will need to infer causality by identifying the links between the following:



You can assume causality only if you can demonstrate that virtually every time you use a particular intervention and clients have a given level of motivation, clients achieve their learning objectives and have positive impact outcomes. The check list in Appendix A, page 19, provides an example of a convenient way of demonstrating a link between the three "client" parts of the above figure.

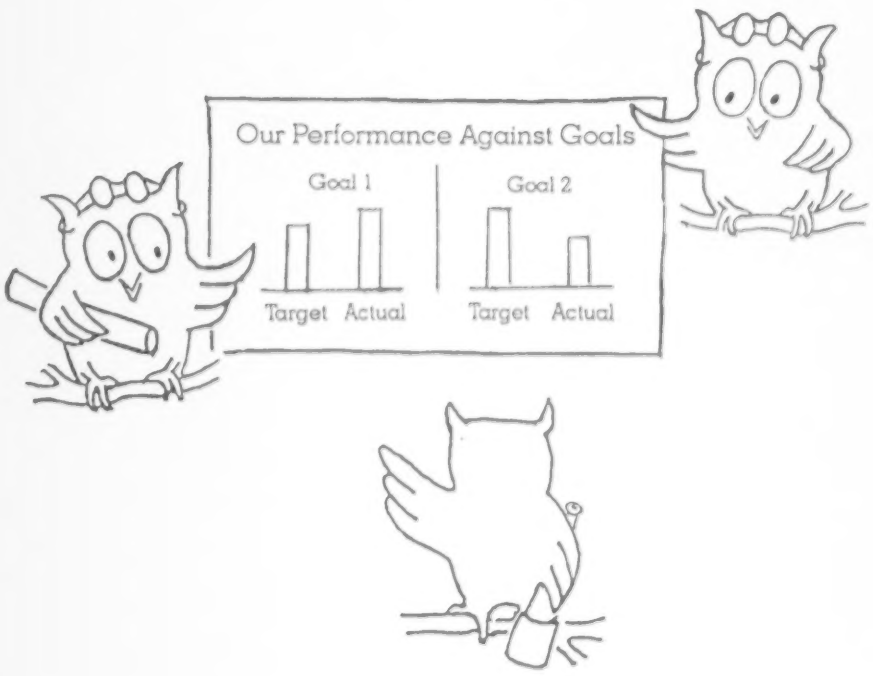


5.5 IMPROVING YOUR EVIDENCE COLLECTION
Work Sheet #15

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Chapter 6

SUMMARIZING AND ACTING ON THE EVIDENCE



Chapter 6
SUMMARIZING AND ACTING ON THE EVIDENCE
[Time Needed: 45 minutes]

6.1 FOCUS OF YOUR REPORTING STRATEGY

There is little point in collecting evidence if you to not use that evidence in ways that benefit your clients and your agency. To make your reports meaningful, you need to revisit the choices you made about stakeholders and what matters to them (see Work Sheets #1C and #1D). Table 6.1 contains some suggestions about summarizing evidence in meaningful ways for your stakeholders. Checklists like the one in Appendix A, page 37, can be used to summarize results for reporting purposes.

Table 6.1
Ways to Summarize Evidence

- Target your summaries at particular stakeholders. This may mean several different types of reporting.
- Group outcome evidence together from similar types of clients so that stakeholders can get both an overview and specific information by type of client.
- Be sure to report evidence in relation to both baseline data and targets or standards set.
- Provide data from a comparison period (e.g., last fiscal year).
- Use visual aids wherever possible (charts, graphs).

6.2 PUBLICIZING THE RESULTS

Collecting evidence on how well you are doing is meaningful only if the right information is communicated to the right people. Re-examine your responses in Work Sheet #1D about how you want to use your evaluation results, and then use Work Sheet #16 to identify any new ways in which you want to communicate with your stakeholders.

Work Sheet #16
Possible Communication Strategies

Strategies	Already	Want to
External Communications		
Annual Report (publicly available)	____	____
Regular reports to your funder	____	____
Regular reports to community boards	____	____
Regular reports to referral sources	____	____
Newsletter (publicly available)	____	____
Periodic news releases	____	____
Provide public copies of:	____	____
____ organization chart	____	____
____ quality of service principles	____	____
____ standards of professional conduct	____	____
____ evaluation policy	____	____
Thank yous & client status to referral sources	____	____
Other: _____	____	____
Internal Communications		
Copies of external communications to staff	____	____
Regular evaluation status reports at staff meetings	____	____
Evaluation status reports available electronically	____	____
Evaluation data available for on-line analysis	____	____
Evaluation master plan circulated	____	____
Evaluation master plan available on-line	____	____
Other: _____	____	____
Client Communications		
Descriptive feedback	____	____
Mailing of publicly-available communication pieces	____	____
Other: _____	____	____

6.3 HIGHLIGHTING POSITIVE ACHIEVEMENTS

In order to make the data collection seem worthwhile, you will want to publicize the positive results of your evaluation process as widely as possible. In Work Sheet #17, identify which publicity mechanisms you already use and which ones you would like to start using.

Work Sheet #17
Strategies to Highlight Positive Achievements

Strategies	Already	Want To
Give awards to outstanding staff members	____	____
Post results on a staff bulletin board	____	____
Post results on a public bulletin board	____	____
Place newspaper article	____	____
Create an external publication for distribution	____	____
Other: _____	____	____
Other: _____	____	____

6.4 WORKING WITH NEGATIVE RESULTS

In any service delivery system, things go wrong and there are areas that need attention. One of the important functions of evaluation is to help you be able to improve your current practices. In Work Sheet #18, indicate how you current handle less-than-positive results.

Work Sheet #18
Present Approaches with Negative Results

Approach	Usually	Seldom
No action		
Ignore/suppress the results	____	____
Analysis		
Determine any mitigating circumstances	____	____
Determine whether the problem is with the service or the evaluation technique	____	____
Assessment		
Conduct a more detailed assessment to determine what you could do differently	____	____
Resolution		
Discuss the results with service providers	____	____
Identify the steps needed for positive results	____	____

Actually, negative results give you a golden opportunity to demonstrate your commitment to quality service — based on how you "recover" from the problem. If you do not already have one, you will need to develop a strategy for improvement and then publicize that strategy and report against it (see Work Sheet #19).

Work Sheet #19
Strategies for Working with Negative Results

Strategies	Already	Want To
Step 1: Assess Poor Performance		
Request service provider's analysis	____	____
Request supervisor's analysis	____	____
Request input from clients	____	____
Request review by external agency	____	____
Other: _____	____	____
Step 2: Analyze Root Causes		
Distinguish between unique circumstances and ongoing problems	____	____
Identify issues with service structure	____	____
Identify issues with service delivery	____	____
Identify issues with client selection	____	____
Identify issues with client expectations	____	____
Identify issues with provider training	____	____
Identify issues with resourcing levels	____	____
Identify issues with evaluation approach	____	____
Other: _____	____	____
Step 3: Resolve the Poor Performance		
Problem-solve resolution(s) of issue(s)	____	____
Provide orientation/support for new approach	____	____
Provide constructive feedback	____	____
Other: _____	____	____
Step 4: Publicize Improvements		
Report internally on positive changes	____	____
Prepare a "before-and-after" item for publicity	____	____
Other: _____	____	____

6.5 REDUCING STAFF RESISTANCE TO EVALUATION

Staff may resist evaluation efforts if they are feel that critical elements are not being included, thereby presenting an incomplete picture. If you have any resistance to evaluation within your agency, please use Work Sheet #20 to clarify why your staff may be resistant to evaluation.

Work Sheet #20
Reasons for Staff Resistance

Possible Reasons	Likely
Our evaluation strategy does not cover all performance categories	____
Our evaluation approach seems burdensome	____
Staff do not receive descriptive feedback from evaluation results	____
Staff do not understand the benefits of evaluation	____
The results of evaluation are only used negatively	____
Other: _____	____

Work Sheet #21 provides several strategies you could use to enhance staff cooperation with evaluation efforts.

Work Sheet #21
Strategies to Reduce Staff Resistance

Strategies	Already	Want To
Involve staff in developing your evaluation policy	____	____
Involve staff in deciding on performance standards	____	____
Involve staff in deciding on the appropriate evidence	____	____
Review positive findings with staff during supervision	____	____
Review positive findings regularly at staff meetings	____	____
Provide rewards for staff receiving positive evaluations	____	____
Issue awards for staff receiving positive evaluations	____	____
Provide supervisory assistance with problem areas	____	____
Use evaluation results to plan staff training	____	____
Other: _____	____	____

6.6 PROVIDING DESCRIPTIVE FEEDBACK

One of the most powerful uses of evaluation evidence is to provide feedback to service providers and clients. When you provide feedback, you have several choices:

- **Praise, or positive feedback**

  This involves global statements such as "I really like the job you did last week" or "you are doing better than last year." Such feedback is usually very welcome, but it provides little information on how to make sure that the positive performance continues.

- **Criticism, or negative feedback**

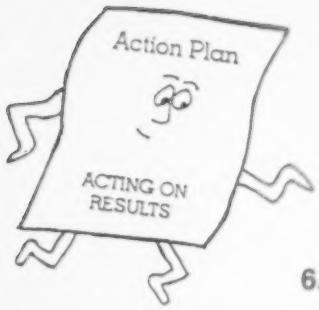
  Most people avoid the evaluation process because they are afraid that the only outcome will be negative judgments. Simply providing negative comments such as "I am disappointed in your performance" or "your performance has not improved" does not help the person figure out ways to change.

- **Descriptive feedback**

  This form of feedback makes explicit the basis on which you have formed a judgement about a person's behaviour — for example, you tell a person they have done well and the give specific examples of behaviours that demonstrate, such as: "Your presentations seem more alive these days. You have lots of eye contact with the audience, and I notice that you seem to look at every single person when you speak which helps them feel involved. You have lots of variety in your tone of voice, and the material is well-organized." Or, "I really like the way you always have a smile in your voice ... it really helps to put clients at ease." When descriptive feedback is done well, persons will even welcome negative comments if they are accompanied by specifics about what they need to change.

Descriptive feedback regarding behaviour that needs to change is most effective if you:

- Identify the desired change
- Identify the steps needed to achieve the change, making the steps small enough to guarantee success
- Watch for successful completion of each step, and then give descriptive praise for both the effort and the positive outcome.

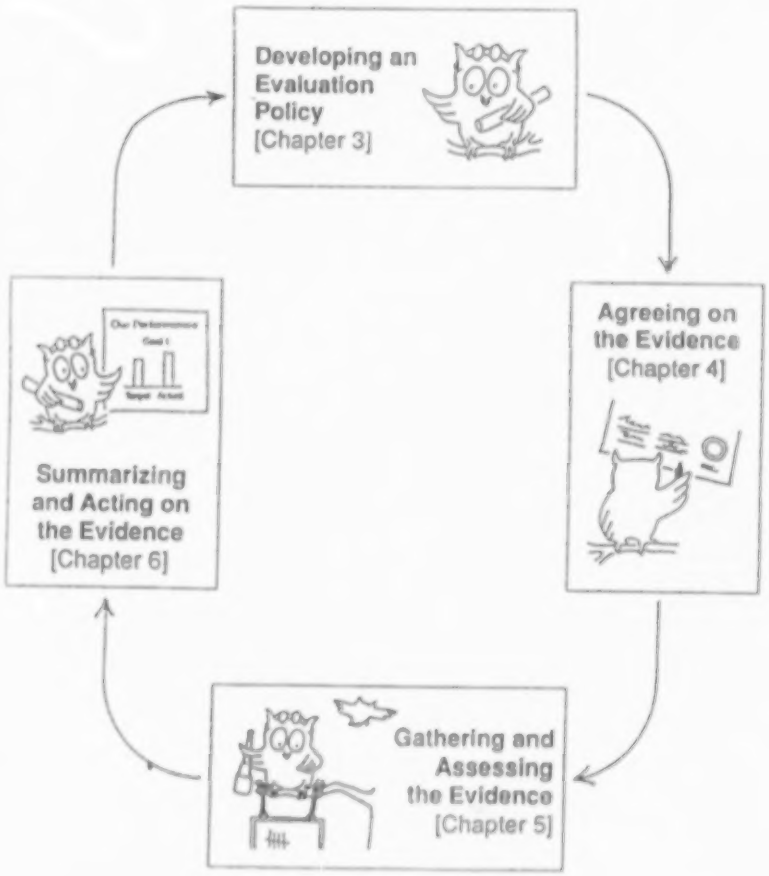


6.7 IMPROVING ACTING ON EVALUATION RESULTS
Work Sheet #22

Change Desired	Steps	Responsible Person	Target Completion Date
1.			
2.			
3.			
4.			
5.			

Chapter 7

REVIEWING YOUR EVALUATION APPROACH


Developing an Evaluation Policy [Chapter 3]
Agreeing on the Evidence [Chapter 4]
Gathering and Assessing the Evidence [Chapter 5]
Summarizing and Acting on the Evidence [Chapter 6]

Chapter 7
REVIEWING YOUR EVALUATION APPROACH

7.1 REVISITING YOUR SELF-ASSESSMENT

Now that you are at the end of this workbook, it is a good time to go back and see if you have done the work you said you needed to do. For example, check your Guide for Evaluation Development Planning or try taking the self-assessment again. The real test, of course, is **can you demonstrate to your stakeholders the value you are providing to your clients?**

7.2 REVISING YOUR EVALUATION APPROACH

Your evaluation approach needs to evolve over time as circumstances change and as you learn more about what is and is not helpful to you and your stakeholders. Here are some specific circumstances that should automatically trigger a review:

- Changes in your agency's objectives and/or values
- Changes in the types of services you offer
- Changes in the types of clients you target
- Changes in your stakeholders

The results of your evaluation approach can also signal that it is time for a review, especially if:

- The results do not give you enough information to make changes.
- You can't differentiate between what is and is not working well.
- You don't have the data needed for your reports.

7.3 FEEDBACK ON THE WORKBOOK

This workbook has been developed to help you be more systematic in your evaluation approach. Please provide feedback to the Canadian Guidance Foundation as requested at the beginning.

Demonstrating Value:
A Career Development Services Evaluation Workbook

Evaluation Form

Please complete this form and return it to the Canadian Guidance and Counselling Foundation. Your feedback will help us improve the workbook and make it even more relevant to users in a broad range of agencies.

Your organization:_____

1. Which parts of the workbook did you use:

	Read	Completed
Chapter 1: Why is Evaluation important		
Chapter 2: Self-assessment		
Chapter 3: Developing an evaluation policy		
Chapter 4: Agreeing on the evidence		
Chapter 5: Gathering and assessing the evidence		
Chapter 6: Summarizing and acting on the evidence		
Chapter 7: Reviewing your evaluation approach		

2. With whom did you complete the workbook?

_____ Board of Directors
_____ Executive/management committee
_____ Career counselling staff
_____ General staff
_____ Graduate students
_____ Other _____

3. How comprehensive did you find the material?

Too detailed ____ Just right ____ Not detailed enough ____

4. Would you recommend that other agencies/organizations with responsibility for career development services use this workbook?

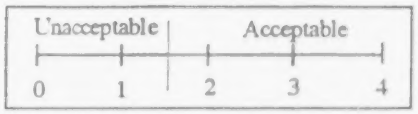
No _____ Perhaps _____ Yes _____

Now please provide us with some more detailed information about your use of the workbook.

5. For the parts of the workbook you used, please complete the following rating scale describing how useful you found each chapter. Please use the same procedures that are described in Appendix A. That is:

Please use a two-step process. **(A)** decide if the usefulness is **Acceptable** or **Unacceptable** **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



	Rating				
	0	1	2	3	-4
Chapter 1: Why is evaluation important					
• Ease of use					
• Sequence of material					
• Coverage of material					
• Orients the user well					
Chapter 2: Self-assessment					
• Ease of use					
• Sequence of material					
• Coverage of material					
• Usefulness of approach					

	Rating				
	0	1	2	3	4
Chapter 3: Developing an evaluation policy • Ease of use					
• Sequence of material					
• Coverage of material					
• Orients the user well					
Chapter 4: Agreeing on the evidence • Ease of use					
• Sequence of material					
• Coverage of material					
• Usefulness of specific exercises					
Chapter 5: Gathering and assessing the evidence • Ease of use					
• Sequence of material					
• Coverage of material					
• Useful of specific exercises					
Chapter 6: Summarizing and acting on the evidence • Ease of use					
• Sequence of material					
• Coverage of material					
• Usefulness of specific exercises					

6. Do you have any specific recommendations for how to enhance the usefulness of this workbook?

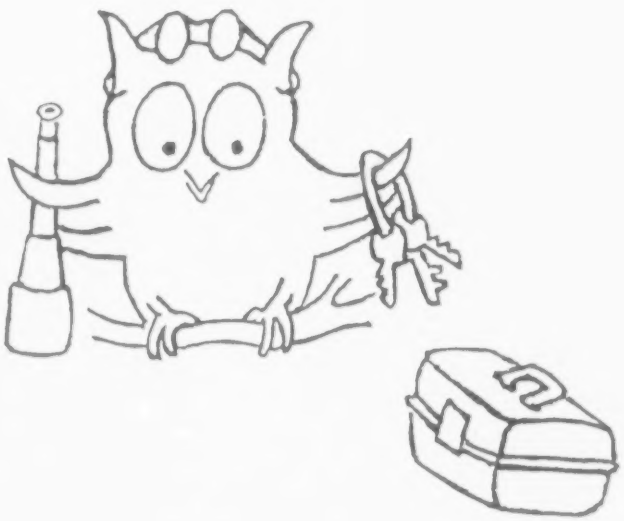
7. Please give us any additional comments you may have:

Please return this form to:

The Canadian Guidance and Counselling Foundation
202-411 Roosevelt Avenue
Ottawa, Ontario
K2A 3X9

Fax: 613-729-3515

APPENDICES



Appendix A

Sample Check Lists
and
Monitoring Forms

Reporting Procedures Check List

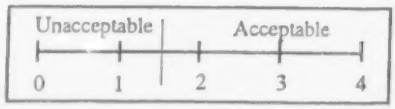
This check list is provided to ensure that service provider reporting expectations are clear and in agreement with funders and other stakeholders. Each reporting requirement should be listed and should be checked off as it is completed and the date indicated for future reference. This form is designed to be completed by both funders/monitors and service providers. When the reporting mechanism is operating effectively, both versions should be identical.

Reporting Requirements	Completed			Date
	N	?	Y	
Quarterly report - first quarter				
Quarterly report - second quarter				
Quarterly report - third quarter				
Quarterly report - fourth quarter				
Report at termination of service				
3 month follow-up report				

Expectations For Client Outcomes	Indicate %	Rating				
		0	1	2	3	4
Clients completing program						
Full-time employment						
Part-time employment						
Contract employment / self-employed						
Self-sufficient						
Not seeking work						
Referral for further training - (indicate skill area)						
•						
•						
Referral for alternate program						
Unable to contact						

Please use a two-step process. (**A**) decide if the skill use is **Acceptable** or **Unacceptable**, then (**B**) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Identifying Intended Program Outcomes

and

Evidence of Client Learning

(Performance Indicators)

It is often easier to obtain consensus amongst stakeholder groups when there is a clear and specific outline of the nature of the program, intervention, or service being offered and the type of client learning that occurs in the program.

To help identify these factors, the following process has been useful.

1. Identify the outcomes that your project will attempt to achieve
   - perhaps start with the activities in the program and ask "What will the client learn as a result of engaging in that activity?"
   - some of the outcomes will be ones that usually occur with virtually all clients (you can probably feel confident promising to deliver these outcomes), other outcomes will be ones you hope will occur, but are less predictable (list these as potential outcomes)
2. List the evidence that will indicate that the outcome has been met. Do this for each of the outcomes listed in Step 1.
3. List the participant skills that will be needed to achieve the outcomes, i.e., the skills that will be needed to make sure the evidence listed in Step #2 is demonstrated. An outcome may have several skills. The Yes/No column on the check list below is to document client skill attainment.
4. List the evidence that will indicate that the client has a reasonable mastery of the skills in step #3.

The following check list will help to specify the various components in the above process.

Program Components						
Outcomes		Process/ Activities	Participant Skills			Evidence (be specific)
Definite	Potential		Skill name	Yes	No	

Client Characteristics

In order to determine the appropriate program for a client, it is important to have a clear picture of the client's strengths and any barriers that will need to be addressed if the client is to be successful.

In cases where an agency is delivering a specific program, it will be most useful if the agency staff:

FIRST specifies the assumptions they have made in designing the program, about the types of clients for which the program is intended:

- what sorts of skills and knowledge clients will need, to be successful in the program,
- the sorts of attitudes clients will need, to make satisfactory progress in the program, and
- what sorts of barriers a client might be facing that would make it more difficult for the program to be successful.

THEN in the initial screening, these client factors can be used to determine if a particular person would be appropriate for the program in question.

The following check list will help to make the elements of the process more specific.

Client Characteristics							
Assets	Self-Sufficiency			Barriers	Severity		
	No	?	Yes		Min	?	Max
Skills: • job search				Personal			
• communication							
• anger management							
•							
•							
Knowledge: • labour market info				Family			
• personal attributes							
•							
•							
•							
Attitudes: • work orientation				Environmental			
• locus of control							
• motivation							
• self-confidence							
•							

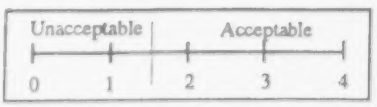
Sample Check List for Evaluating Inputs

Please rate each item using the scale described at the bottom of this page.

Service Standards	Rating (see scale below)				
	0	1	2	3	4
Number of FTE staff available for career counselling					
Proportion of staff time available for career counselling					
Staff time use: (record % then rate performance on each item)					
• work with clients					
• consultation					
• client advocacy					
• networking					
• coordination					
• collaboration					
• supervision					
• professional development					
Client flow: (record # clients, then rate performance on each item)					
• decision making					
• skills enhancement					
• job search					
• employment maintenance					
• Total # client (some clients may work on more than 1 dimension)					
Agency has met objectives: (list objectives below)					
•					
•					
•					

Please use a two-step process. **(A)** decide if the outcome use is **Acceptable** or **Unacceptable** **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Guidelines for Selecting External Service Providers

Contractor:_____ Assessor:_____

	A. Structure of the Service Provider/Agency*	Yes	?	No
1.	**Does the service provider have a mission statement that identifies:** the main client group(s) served			
	the primary outcomes to achieve			
	values guiding service delivery			
2.	**Does the service provider have a statement of "services offered" that identifies:** types of services			
	program components			
3.	**Does the service provider have a statement of "service delivery standards" that includes:** cycle time for admission (wait time, length of wait list, etc.)			
	sessions (number of interviews, session length, etc.)			
	staff case load			
	follow-up procedures			
	evaluation procedures			
	procedures & cycle times for reporting to other agencies			
	geographic areas served			
	test materials used			
4.	**Does the service provider have a statement outlining how clients are informed of services available?**			
5.	**Does the service provider have a statement outlining staff credentials that includes:** qualification of staff			
	supervision provision of staff			
	professional development expectations for staff			
	professional associations to join			
6.	**Does the service provider have a statement outlining standards of professional conduct for its staff that includes:** legal obligations			
	confidentiality			
	obligations of staff and expectations of clients			

		Yes	?	No
7.	**Does the service provider have a statement outlining its management practices, that includes:** provision of an accessible facility			
	provision of a "safe and trusting" environment for clients			
	client admission criteria			
	case documentation			
	record retention and disposal			
	client termination (discharge) criteria			
	client termination (discharge) documentation procedures			
	referral procedures			
8.	**Does the service provider have a statement on "quality assurance" that includes:** job descriptions of staff			
	ongoing supervision of staff			
	performance review of staff			
	case consultation procedures			
	interactions with others (e.g., case managers)			
	accreditation or licensing of service provider			
	accreditation or licensing of agency			
	insurance coverage			
9.	**Does the service provider have a statement outlining how evaluation of service is conducted, that includes:** client feedback on service			
	peer review of service delivery			
	supervisor review of service delivery			
	supervisor review of staff–client interaction			
	assessment of client outcomes			
	follow-up of client outcomes			
10.	**General** brief description and history of the firm			
	sample copies of case documentation (assessments, progress reports, etc.)			
	client references			
	business references			

	B. History of Service Provider/Agency	Yes	?	No
1.	**Timeliness** wait time to receive service			
	progress reports on time			
	work samples of clients on time			
	invoices/claims forms on time			
2.	**Outcomes** success rates			
	criteria used to determine success			
	cost per unit (dollars per placement, etc.)			
3.	**Cooperation** success rates			
	flexibility/adaptability of referral process			
	flexibility/adaptability of service delivery			
3.	**General** soundness of financial management procedures			
	public relations record			
	past experience with similar clientele			
	other past experience with high barrier clients			
	understanding of funder needs			
4.	**Others** (please specify)			

*NOTE: The structure for the first section of this checklist was adapted from *Quality Career Counselling Services: A Policy Workbook*, by Dorothy I. Riddle and M. Lynne Bezanson, published by the Canadian Guidance and Counselling Foundation.

People wishing to examine quality assurance issues within their agencies or organizations may purchase a copy of *Quality Career Counselling Services: A Policy Workbook*, from the Canadian Guidance and Counselling Foundation, #202, 411 Roosevelt Ave., Ottawa, Ontario, K2A 3X9.

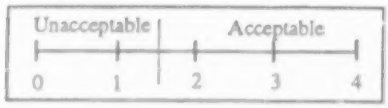
Service Standards Check List

Please rate each item using the scale described at the bottom of this page.

Evaluation of Service: Overall	Rating (see scale below)				
	0	1	2	3	4
• accessibility					
• timeliness					
• responsiveness					
• general client satisfaction					
Evaluation of Service: Specific					
• General performance expectations					
• Specific program considerations (please list)					
• Client learning outcomes: decision making					
skills enhancement					
job search					
employment maintenance					
• Overall client self-sufficiency					
• Client has obtained a job					
• other					
General Service Evaluation Factors					
• # clients @ self-reliance (specify employment dimension)					
• cost					
• # clients obtaining job					
• client needs met					
• appropriateness of clients for programs					
• other					

Please use a two-step process. (A) decide if the outcome use is **Acceptable** or **Unacceptable** (B) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



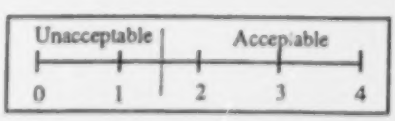
Client Feedback Check List

(To be completed by each client at the finish of the program)

	Rating (see scale below)				
	0	1	2	3	4
My counsellor has:					
• outlined staff roles & responsibilities					
• outlined expectations of client					
• confirmed client place in job loss cycle					
• completed assessment of client needs					
• outlined available programs					
• explained how programs address client needs					
Generally speaking, how competent do you think the staff are?					
• receptionist					
• counsellor					
• program coordinator					
• group facilitator					
Generally speaking, please rate each of the following:					
• accessibility					
• timeliness					
• responsiveness to client needs					
• overall satisfaction with service					
At the beginning, how knowledgeable were you about the programs and services available to you?					
NOW, how knowledgeable are you about the programs and services available to you?					

Please use a two-step process. **(A)** decide if the skill use is **Acceptable** or **Unacceptable**, then **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding

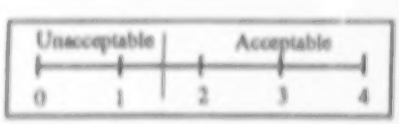


Client Feedback Check List (Continued)

	Rating (see scale below)				
	0	1	2	3	4
Initially the following client needs were identified to be met by this program. Please indicate how well each of these needs have been met. (list the specific needs)					
•					
•					
•					
•					
In addition to the above, some needs were identified during the program as being particularly important to you. Please indicate how well each of these needs have been met. (list the specific needs)					
•					
•					
•					
•					
Client has an occupational goal Yes_____ No _____ specify goal					
Rate how optimistic you are that your goal will be achieved					
Client has an action plan Yes_____ No _____ specify main elements of action plan					
Rate your chances of completing your action plan					

Please use a two-step process. (**A**) decide if the skill use is **Acceptable** or **Unacceptable**, then (**B**) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Client is self-sufficient in the following areas (please list)

•
•
•

Group Job Finding Club: Participant Satisfaction Form

For each item below, please indicate how useful you found each part of the program. Please place an "x" in the appropriate box to mark your choice.

Job Finding Club Evaluation	0 Totally Useless	1 Mostly Useless	2 So-So	3 Mostly Useful	4 Very Useful
Daily Progress Chart					
Day 1: • Network Planning					
• Calling cards					
Day 2 • Resumés					
• Networking Calls					
• References					
• Yellow Pages					
Day 3 • Interview Planning					
• Telephone Calls-presentation					
• Telephone Calls-practice					
Day 4 • Letters					
Day 5 • Video taping					
Day 6 • Review & practice, letters, telephone calls					
Day 7 • Telephone scripts					
• Application forms					
Day 8 • Leads & resources presentation					
• Prepare for interview					
Day 9 • Video practice					
Day 10 • Presentation on the Workplace					
• Video practice					
Week 3 • Follow-up					
•					
•					
•					

Group Job Finding Club: Participant Satisfaction Form

For each item below, please indicate how useful you found each part of the program. Please place an "x" in the appropriate box to mark your choice.

Preparation Session Evaluation	0	1	2	3	4
	Totally Useless	Mostly Useless	So-So	Mostly Useful	Very Useful
Exploring self, identifying skills and interests					
Developing a clear job objective					
Having a chance to deal with emotional barriers					
Building group spirit					
I feel ready to work in the Job Finding Club now	definitely not	maybe	I'm not sure	I think so	definitely yes

What was the best part of the preparation session?

What was the worst part of the preparation session?

Check List of Counsellor Competencies
Counselling Process Checklist

(Please refer to the instructions in the box below.)

General Skill Training Approach				
Steps Involved	Completed			Rating
	N	?	Y	0, 1, 2, 3, 4
Skill Training (name skill)				
1. Skill was explained				
2. Skill demonstrated by facilitator				
3. Worker practice of skill				
4. Feedback on worker practice				
(number of practice rounds)				
5. Application of skill				
(home practice, practice outside of training context)				
Skill Training (name skill)				
1. Skill was explained				
2. Skill demonstrated by facilitator				
3. Worker practice of skill				
4. Feedback on worker practice				
(number of practice rounds)				
5. Application of skill				
(home practice, practice outside of training context)				
Skill Training (name skill)				
1. Skill was explained				
2. Skill demonstrated by facilitator				
3. Worker practice of skill				
4. Feedback on worker practice				
(number of practice rounds)				
5. Application of skill				
(home practice, practice outside of training context)				

Counsellor Presentation Skills (for lecturette or other structured presentations)	
Skill	Rating 0, 1, 2, 3, 4
• organized	
• clear explanations	
• eye contact: amount	
• eye contact: extent (includes all members)	
• dynamic	
• group involvement (personalize input)	
• Other	

Instructions

Check list to the left: When teaching clients any skill, some variation of the 5 steps in the check list are followed. First, indicate whether the counsellor completed each step, then rate how well the skill was completed using the rating system described below.

Check list above: Successful presentations usually involve a combination of all of the items listed in the check list. Rate the counsellor's use of these skills using the rating system described below.

Please use a two-step process. **(A)** decide if the outcome use is **Acceptable** or **Unacceptable** **(B)** assign the appropriate rating:

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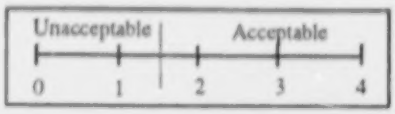


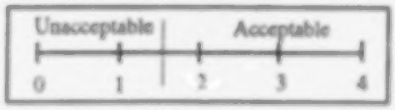
Counsellor Individual Counselling Skills

(Patterned after HRDC Module 2, Individual Counselling)

I. Skills (the specific actions that counsellors demonstrate with clients)	Rating 0	1	2	3	4
• Overviewing					
• Concreteness					
• Summarizing					
• Questioning					
• Calling for a demonstration					
• Listening/paraphrasing					
• Encouraging					
• (list other skills)					
•					
•					

Please use a two-step process. **(A)** decide if the skill use is **Acceptable** or **Unacceptable**, then **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



NOTE: The above list of skills is for illustration only. Counsellors using differing orientations may use different skills and differing client situations may necessitate using skills not included in the above list. Therefore, agencies are encouraged to develop their own version of the above check list to reflect the orientation of their counselors and the types of client problems they encounter.

Counsellor Skill Coding Grid

Skills	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Structuring																				
Overview																				
Info Giving																				
Transition																				
Summary																				
Other Structuring																				
Soliciting																				
Closed Questions																				
Open Questions																				
Declarative Probes																				
Describing Inconsistency																				
Other Soliciting																				
Reacting																				
Descriptive Praise																				
Correctional Feedback																				
Paraphrasing Content																				
Reflecting Meaning																				
Reflecting Affect																				
Other Reacting																				
General																				
Nonverbal																				
Air Time																				

The above coding grid has been used to provide feedback on counsellor skill use. To us it, each time the counsellor speaks, place a check mark in the row naming the skill the counsellor used. Use column 1 the first time the counsellor speaks, column 2 the second time, and so on. In this way it is possible to document the pattern of skill used as well as frequency. The skills named are patterned after the framework used in *Instructional counseling: A method for counselors*, by Jack Martin and Bryan Hiebert, but any skill framework could be used with this coding system simply by substituting skills names from the alternative framework.

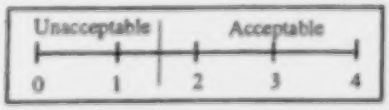
Counsellor Group Facilitation Skills

(Patterned after Borgen and Amundson)

I. **Reaction Skills** (demonstrate understanding of group members' needs and actions)	Rating 0	1	2	3	4
• Active Listening					
• Paraphrase					
• Clarifying					
• Empathy					
• Summarizing					
• Information giving					
II. **Interaction Skills** (guide and stimulate group interaction)					
• Moderating					
• Linking					
• Blocking					
• Supporting					
• Limiting					
• Consensus-taking					
III. **Action Skills** (direct and promote group process)					
• Questioning					
• Advanced empathy					
• Confronting					
• Immediacy					
• Self-disclosure					
• Modeling					
• Process Observing					
• Goal setting/contracting					

Please use a two-step process. (**A**) decide if the skill use is **Acceptable** or **Unacceptable**, then (**B**) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Group Job Finding Club: Program Audit Check List

This form is for use by facilitators, supervisors, and external evaluators to document how closely the Job Finding Club program is being followed. For each program element listed in the left hand columns below, indicate whether or not that element was addressed in the session under observation, and the quality demonstrated by the facilitator. To assess the quality, please use the 4-point scale described at the bottom of page two. If some elements were not addressed by the facilitator, but were a scheduled part of the session under observation, please indicate the reason(s) for departing from the standard protocol.

General Factors	N	?	Y
Facilitator is at appropriate place in 3 week agenda			
Stated goal for session is: same as schedule			
OR different from schedule, but reason is acceptable			

Program Element	Completed N	?	Y	Rating 0, 1, 2, 3, 4
Preparation Session				
Self-exploration				
• transferable skills				
• interests				
• sources of satisfaction				
• merging results				
Discuss potential affective barriers				
• anger				
• depression				
• loss of motivation				
Group building				
• group discussion not didactic				
Commit to 3-4 weeks				
• group discussion of priorities				
Job Finding Club				
Facilitator Skills				
Brief Talk Rule				
• clock facilitator air time				
• chart air time of facilitator vs. participants				
Positive Approach				
• tally facilitator comments positive-descriptive, positive-general corrective negative				
Automatic Rotation				
• clock time spent with each participant				
• tally # of facilitator contacts with each participant				

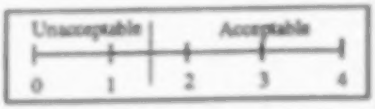
Facilitator Skills	Completed N	?	Y	Rating 0, 1, 2, 3, 4
General Skill Training Approach				
Skill Training (name skill)				
Skill was explained				
Skill demonstrated by facilitator				
Worker practice of skill				
Feedback on worker practice				
(Number of practice rounds)				
Application of skill				
(home practice, practice outside of training context)				
Skill Training (name skill)				
Skill was explained				
Skill demonstrated by facilitator				
Worker practice of skill				
Feedback on worker practice				
(Number of practice rounds)				
Application of skill				
(home practice, practice outside of training context)				
Skill Training (name skill)				
Skill was explained				
Skill demonstrated by facilitator				
Worker practice of skill				
Feedback on worker practice				
(Number of practice rounds)				
Application of skill				
(home practice, practice outside of training context)				

Job Finding Club Program Elements	Completed N	?	Y	Rating 0, 1, 2, 3, 4
Day 1				
• Overview of program				
• Introductions of group members				
• Networking				
• Calling cards				
Day 2				
• Progress chart				
• Calling Cards				
• Resumds				
• Networking Calls				
• References				
• Yellow Pages				
Day 3				
• Progress chart				
• Interview Planning				
• Telephone Calls- presentation				
• Informational Interviews- presentation				
• Video Taping				
• Telephone Call- practice				
Day 4				
• Progress Chart				
• Letters				
Day 5				
• Progress chart				
• Video Review				
• Video Practice				
Day 6				
• Progress Chart				
• Review Letters				
• Practice Letters				
• Practice Telephone calls				

Day 7				
• Progress chart				
• Telephone Scripts				
• Application Forms- presentation				
• Review of letters, networking calls, employer calls				
Day 8				
• Progress Chart				
• Review Interviews				
• Prepare for Video #2				
• Leads & Resources				
Day 9				
• Progress chart				
• Video #2-presentation				
• Video #2-practice				
Day 10				
• Progress Chart				
• The ""orkplace				
• Video #2 practice				
• Evaluation form				
**Week 3 Daily schedule)				
• Progress Chart				
• Review of Relevant Information (As required)				
• Review Topic (name topic)				
• Describe topic				
• Continuing skill practice				
• Review Topic (name topic)				
• Describe topic				
• Continuing skill practice				
• Review Topic (name topic)				
• Describe topic				
• Continuing skill practice				

Please use a two-step process. (A) decide if the skill use is **Acceptable** or **Unacceptable**, then (B) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



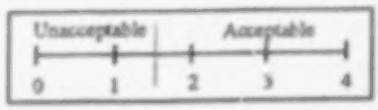
Group Job Finding Club: Client Tracking Check List

(to be completed for each participant)

Referral Criteria	Criteria met Y ? N			Contractor Expectations	Expectations for Client	Evaluation 0,1,2,3,4
wants full time employment				Return 1 copy of this report for each client to the project manager as part of the 1 month follow-up report	**Client Process**	
can handle work in groups					Attendance	
receptive to structured approach					Network Telephone Practice	
English competency				**Client Process** refers to how well the client engaged in the training process for each element	Resumé	
emotionally stable					Video interview practice	
medical condition stable					Application Forms	
not booked for surgery					Cover Letter	
no medical investigation					Job Leads	
no medication interference					Evaluation Form	
not in active appeal process				**Client Skills** refers to how well the client mastered the skills taught in the Job Finding Club	**Client Skills**	
no full time school scheduled within 4 mo					Telephone skills • Network calls	
no substance abuse					• job leads	
not emotionally challenged					Informational interview skills	
Case Mgr approval					Job interview skills	
pre-session completed				**Client Outcomes** refers to the products that clients produce during the Job Finding Club. These should be part of each client's file	**Client Outcomes**	
defused anger, is ready to proceed					Network chart	
identified transferable skills					calling cards	
clear job objective					Sample application forms	
commit to 5-6 hrs/day, 3 wks					Resumé	
					Cover letter	
					Job offer	
					Job accepted	N Y

Please use a two-step process. (A) decide if the skill use is **Acceptable** or **Unacceptable**, then
(B) assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Job Interview Skills Practice Log Sheet

Use the following form to keep track of job interviews you have done. Please fill in the date of the interview, the interviewer's name and the name of the firm, then rate the three categories requested. The interviewer rating is included, because the interviewer plays a large part in how well the interview goes. The other two columns are for clients to rate their part in the interview.

Use the following scales to chart your reactions.

I thought the interviewer was	1=unfriendly 2=OK 3=really friendly
Your skills	1=poor 2=fair 3=OK 4=mostly good 5=excellent
How you felt the interview went	1=poor.....5=OK.....10=great

		Client Name		
Date	Interviewer Name	Interviewer rating	My skills	How I felt

This log sheet can be used by clients to self-monitor and self-evaluate their skill practice. It can be used equally well in programs like *The Job Finding Club* or in actual job interviews clients attend in the field. It also can be used by counsellors to evaluate client performance during a training program.

Skill Practice Record Sheet	Name
Skill	Date: From To

Each time you practice a skill you are working on, record the result in the boxes below. Use one box for each practice time.

Who did I try this with?				When?
What happened				
I am	sad	O.K.	happy	about how this worked
Next time I will				

Who did I try this with?				When?
What happened				
I am	sad	O.K.	happy	about how this worked
Next time I will				

Who did I try this with?				When?
What happened				
I am	sad	O.K.	happy	about how this worked
Next time I will				

	No	Yes
Now I can usually do this skill		
I still need more work on this skill		

This form has been used in a variety of settings to monitor skill practice at home or other field settings. It can be used for a variety of skills, such as: saying nice things to other people, thinking self-supporting thoughts, looking at people when speaking to them, organizing work materials, or taking a deep breath and letting it out slowly instead of getting mad, etc.

Anger Management Practice Record

Name

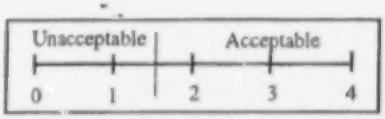
Use the following form to log your use of anger management skills. For each skill, indicate the situation in which you used the skills and rate how well each skill worked for you. Then fill in the information at the bottom of the chart.

Situation		Date:
Skill	Use (check all you used)	How well did it work
Count to 10		0 1 2 3 4
Walk away		0 1 2 3 4
Talk it out		0 1 2 3 4
Deflection		0 1 2 3 4
Get help		0 1 2 3 4
Other (list)		0 1 2 3 4
		0 1 2 3 4
Describe what happened		
I am sad O.K. happy about how this worked		
Next time I will		

	No	Yes
Now I can usually do this OK		
I still need more work on this skill		

Please use a two-step process. **(A)** decide if the skill use is **Acceptable** or **Unacceptable**, then **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



RELAXATION HOME PRACTICE LOG SHEET

Name_____

	Date/Time		
Indicator	Start	Finish	Difference
pulse rate (beats per minute)			
breathing rate (beats per minute)			
finger temperature (degrees)			

Feelings, body sensations, etc.

Thoughts, perceptions, imagery, etc.

This sheet has been used as part of relaxation training programs, to help clients track their home practice and become more aware of the feelings and thoughts associated with deep relaxation. In addition, it provides information on how much home practice clients are doing. Clients are taught to self-monitor heart-rate, breathing rate, and given a small thermometer to measure finger temperature. Clients take these three measures before and after home practice, thereby providing objective data on what is happening to their bodies while they practice the relaxation exercise. Thus, this form provides information on client adherence to the home practice aspect of the relaxation program, in addition to how well the client is learning the skill of relaxation. Once relaxation skill has been learned, clients can use it in situations, such as: job interviews, anger management, communication, general stress, etc.

More information on this relaxation program, complete with program guide, audio cassette, and thermometer can be obtained from:

Per Man Consultants Ltd.
4840 Verona Drive N. W.
Calgary, Alberta
T3A 0P4

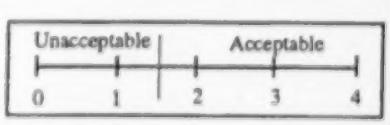
Check List of Potential Client Learning Outcomes

Please rate each item using the scale described at the bottom of this page.
(If a particular item is not relevant for your client, draw a line through the rating boxes for that item)

I. Career Decision Making	Rating (see scale below)				
	1	2	3	4	5
• Self-awareness of: occupational interests					
• Relevant aptitudes					
• Job-related skills					
• Decision making skills					
• Adaptability skills					
• Ability to find and use labour market information					
• Awareness of alternative employment options					
• Adaptability in range of options considered					
• Independence in managing career changes					
• Knowledge of community resources					
II. Skills Enhancement					
• Acquired specific skill training (name certificate or training program completed)					
• Acquired opportunity creation skills					
• Acquired interpersonal skills					
• Acquired self-management skills					
• Acquired literacy skills					
• Acquired numeracy skills					
• Acquired computer skills					
• Enhanced employability					

Please use a two-step process. **(A)** decide if the outcome use is **Acceptable** or **Unacceptable** **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



III. Job Search	Rating (see scale below)				
	1	2	3	4	5
• Ability to identify and follow-up on job leads					
• Ability to prepare resumé & cover letter					
• Self-presentation skills					
• Job interview skills					
• Ability to negotiate appropriate employment contract					
• Overall knowledge and skill in job seeking					
IV. Job Maintenance					
• Ability to acquire information about job entitlements					
• Knowledge of factors contributing to job loss					
• Conflict resolution skills					
• Overall work habits					
• Ability to negotiate non-job-loss options					
• Skills for coping with job transition					
• UI claimaat rights					
• Reducing living budget					
• Coping with psychological effects of job loss					

Please use a two-step process. **(A)** decide if the outcome use is **Acceptable** or **Unacceptable** **(B)** assign the appropriate rating:

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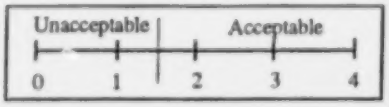
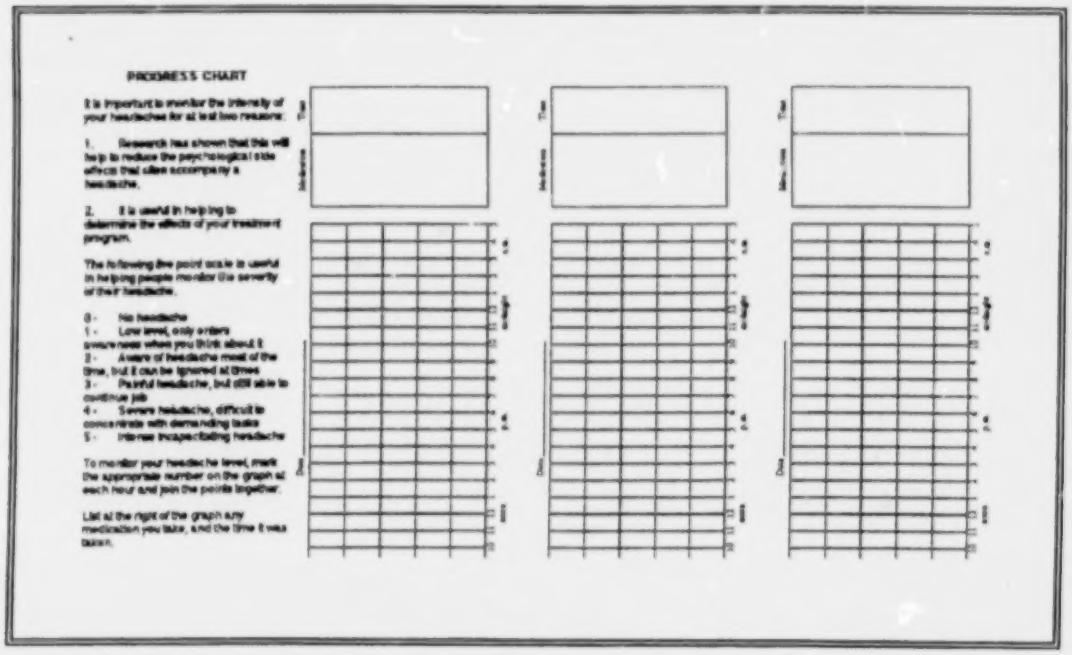


Self-Monitoring Guides

Self-monitoring is an effective way of obtaining information on subjective experiences like headaches and chronic pain, on affective states like stress and anxiety, and on attitudinal variables like motivation, self-confidence, commitment to a program, or how much a person likes school.

The chart below was developed for clients in a headache treatment program. It was produced to fit on both sides of a 8.5" by 14" page, so that 1 side contained the instructions and 3 coding grids and the other side contained 4 grids. This way, 1 sheet of paper contained 7 days worth of information and, when folded in quarters, is easy to carry. A full size copy of the recording grid appears on the next page that can be used as a photocopy master. To use this self-monitoring guide for other variables, it is simply a matter of developing a different coding grid that clients can use. Some examples are provided on the following pages.



PROGRESS CHART

It is important to monitor the intensity of your headaches for at least two reasons.

1. Research has shown that this will help to reduce the psychological side effects that often accompany a headache.

2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor the severity of their headache.

0 - No headache
1 - Low level, only enters one's mind when you think about it
2 - Aware of headache most of the time, but it can be ignored at times
3 - Painful headache, but still able to continue job
4 - Severe headache, difficult to concentrate with demanding tasks
5 - Intense incapacitating headache

To monitor your headache level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken.

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PROGRESS CHART

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To monitor your headache level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken.

Placing a coloured dot on your watch will help you remember to do this.

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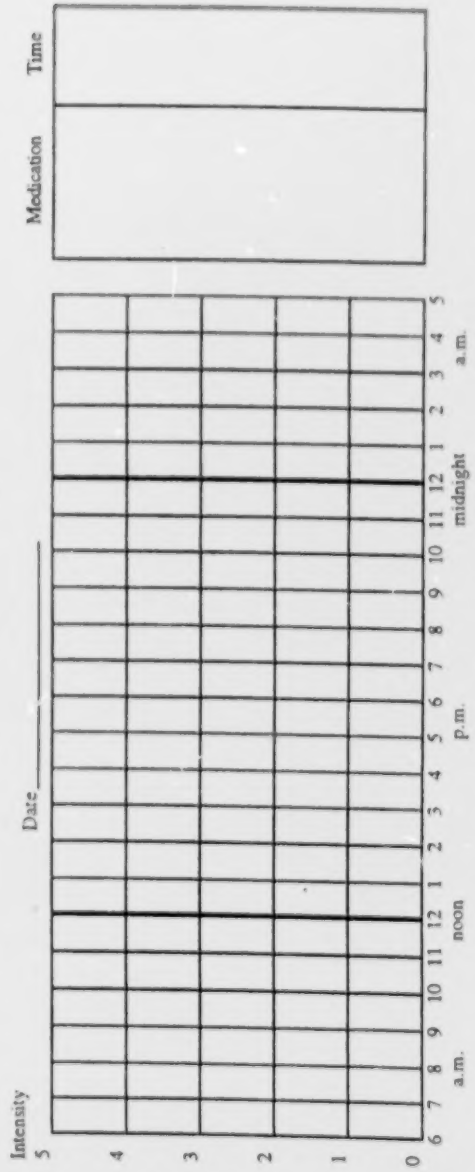
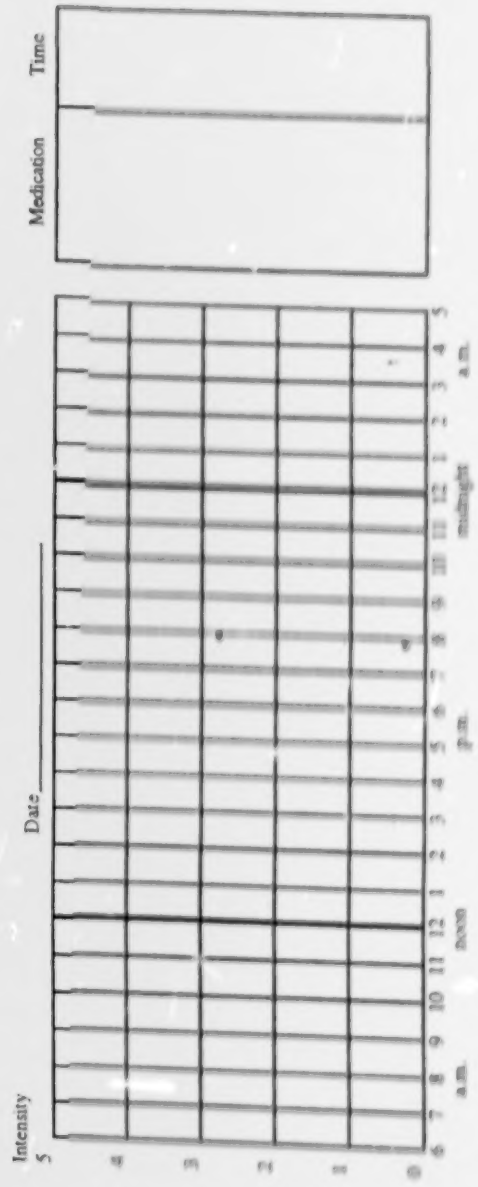
Name:





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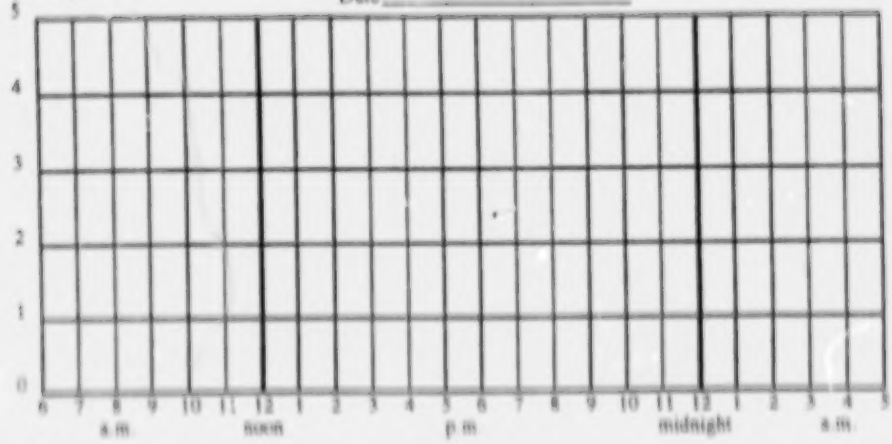
Intensity

Date _____

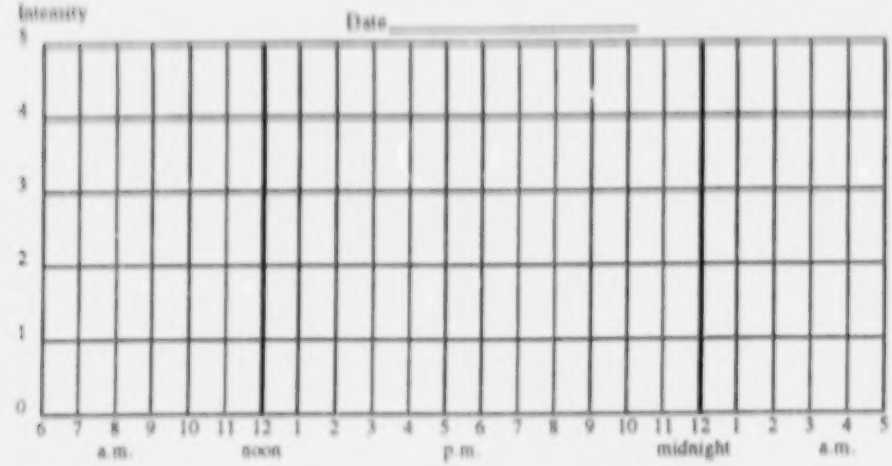
Medication | Time



Intensity

Date _____

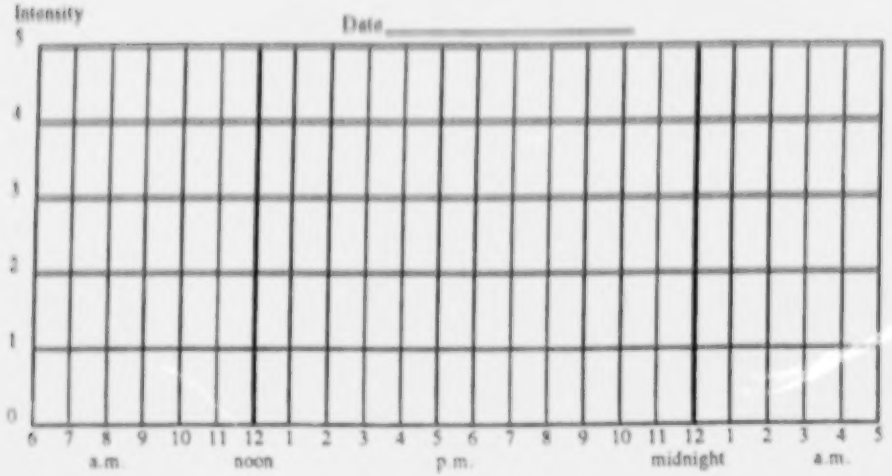
Medication | Time



Intensity

Date _____

Medication | Time



Systematic self-monitoring can have several benefits for both client and counsellor.

1. It can help identify events or situations that trigger a problematic response. Often people are not aware of the events that trigger responses like anger, stress, pain, or feeling lethargic. They sometimes are vaguely aware of when these responses occur, but not of the physical, cognitive, and interpersonal, aspects of the situations that act as triggers. Systematic self-monitoring often helps to identify the specific aspects of situations that trigger a response.
2. People often don't realize they are responding until they are so worked up that behaving effectively is difficult. In cases like this, the response has become out of control before they realized it. Learning to adopt an objective viewpoint about the response under observation can help control it. Self-monitoring helps people react to a situation before they become too upset to deal with it to the best of their ability.
3. If the self-monitoring starts before the intervention (or at the very beginning of a program) it can provide good baseline data against which to compare change that takes place during counseling.
4. Once an intervention has begun, the self-monitoring information can provide convincing evidence of how effective the program is. This can be very motivating for clients and can provide useful evaluation evidence for counsellors. The self-monitored charts can provide a variety of useful data, such as the average intensity of the response, duration of response, amount of time that a response has been below as certain level (e.g., lower headache pain) or above a certain level (e.g., motivated enough to look for work).

Sample Instructions for Self-Monitoring Guides

Stress Monitoring Chart

It is important to monitor the intensity of your stress levels for at least two reasons:

1. Research has shown that this will help reduce the psychological side effects associated with your stress and often will help to reduce stress level.
2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor the severity of their headache.

0 - No stress
1 - Low level, only enters awareness when you think about it
2 - Aware of stress level most of the time, but still able to stay focused on job
3 - Very stressful, beginning to interfere with what you are doing
4 - Severe stress, creates major interference with what you are doing
5 - The most stress you ever feel

To monitor your stress level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken, and any situations that affected your stress level and when they occurred.

Placing a coloured dot on your watch will help you remember to do this.

Motivation Monitoring Chart

It is important to monitor the intensity of your motivational level for at least two reasons:

1. Research has shown that this will help increase the amount of control people feel over their motivational level.
2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor their motivation level.

0 - I couldn't care less if I ever found a job
1 - If I run out of things to do, I'll try looking for a few jobs
2 - I sort of care and I might get around to looking for work today
3 - Quite a bit motivated, I think I will end up doing some of it
4 - Very motivated, but something might come up to interfere
5 - Very motivated-it's the most important thing for me to do today

To monitor your motivation level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken, and any situations that affected your motivation level and when they occurred.

Placing a coloured dot on your watch will help you remember to do this.

Pain Monitoring Chart

It is important to monitor the intensity of your pain episodes for at least two reasons:

1. Research has shown that this will help reduce the psychological side effects associated with your pain.
2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor the severity of their pain.

0 - No pain
1 - Low level, only enters awareness when you think about it
2 - Aware of pain most of the time, but it can be ignored at times
3 - Very painful, but still able to continue job
4 - Severe pain, difficult to concentrate with demanding tasks
5 - Intense incapacitating pain

To monitor your pain level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken.

Placing a coloured dot on your watch will help you remember to do this.

Self-confidence Monitoring Chart

It is important to monitor the intensity of your self-confidence level for at least two reasons:

1. Research has shown that this will help you feel more in control of how confident you feel.
2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor their level of self-confidence.

0 - No confidence at all in your ability to handle the situation
1 - Low confidence, but I might get lucky and it will turn out OK
2 - Sort of confident, I think I might be able to handle it, but probably not
3 - Pretty confident, I think I have a chance of this working out OK
4 - Very confident, I'll probably be able to pull this off
5 - Completely confident about what you am doing

To monitor your confidence level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken, and any situations that affected your self-confidence and when they occurred.

Placing a coloured dot on your watch will help you remember to do this.

Job Satisfaction Monitoring Chart

It is important to monitor your job satisfaction for at least two reasons:

1. Research has shown that this will help place job satisfaction in a more objective perspective.
2. It is useful in helping to determine the effects of your treatment program.

The following five point scale is useful in helping people monitor their level of job satisfaction.

0 - No satisfaction at all with your job
1 - Somewhat satisfied, there are some things about your job that are OK
2 - Satisfied enough – as jobs go, this one is as good as any
3 - Mostly satisfied, occasionally there are things about your job that you actually like
4 - Very satisfied, but there are occasional things bother you
5 - Completely satisfied with your job, feeling a sense of self-fulfillment

To monitor your satisfaction level, mark the appropriate number on the graph at each hour and join the points together.

List at the right of the graph any medication you take, and the time it was taken, and any situations that affected your job satisfaction and when they occurred.

Placing a coloured dot on your watch will help you remember to do this.

Self-Monitoring (And Changing) Self-Talk

Everyone talks to themselves almost all the time. The specific things people say to themselves (i.e., their self-talk) create a strong influence on the way they feel. When people say things like "Hey, you could have done better," or "There you go again, you never do anything right," or "What a stupid thing to do," they must often end up feeling rotten, depressed, or stressed. These types of "self-put-downs" usually have the effect of increasing people's stress level and decreasing their self-confidence.

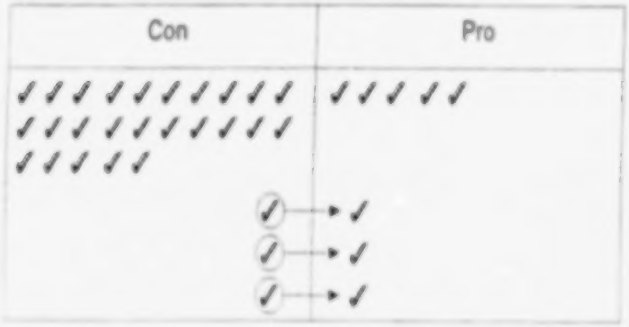
When people learn to change their self-talk and make it more positive, they invariably end up feeling more encouraged, less stressed, and more willing to risk trying something new. We all know how encouraging it is to have someone right beside us, giving us a pat on the back, recognizing our strong points, and keeping our enthusiasm and encouragement at a high level. That someone can be ourselves, if we replace our negative self-statements with positive ones.

An easy way to monitor self-talk is to use an index card, or a small pocket notebook, divide it in half, label one side positive (or "Pro") and the other side negative (or "Con"), and then place a check mark on the appropriate side whenever you catch yourself saying or thinking something about yourself. If the comment is positive, place a check mark on the "Pro" side, if the comment is negative, place a check mark on the "Con" side. Typically, the amount of stress people feel, how self-confident they feel, and many aspects of their general emotional state, is directly related to the amount of negative self-talk they engage in: the more negative self-statements, the more stress people feel—the more positive (less negative) self-statements, the less stress people feel.

For most people, doing this sort of monitoring for 3 or 4 days, or even a week, will give them an idea of their typical pattern. Then they can begin a program to increase the amount of positive or encouraging self-talk. To do this, they simply try to increase the number of checks in the "Pro" column. Do not worry about decreasing the number of negative self-statements—if the number of positive self-statements increases, the number of negatives will go down automatically. At first it may seem artificial to talk positively to yourself. This is because you are not used to doing it. Things that are new, often seem a bit artificial. Just make sure your positive comment is a legitimate one (no false praise), keep practicing it, and keep recording. Continue the monitoring for 1 or 2 weeks, or until the process of talking more positively becomes natural. You can then phase out the recording, returning to the procedure in periods of high pressure, or at times when you are feeling stressed.

It may be helpful when trying to change self-talk pattern to record the number of times you catch yourself saying something negative and change it into something positive. This can be done by simply drawing an arrow from the check-mark on the negative side, to a check-mark in the positive side. This will be evidence of success, in a program to change negative, self-defeating self-talk into more positive, self-supporting self-talk.

The following is a sample of a self-talk monitoring sheet .



This type of self-monitoring sheet provides evidence of program adherence, and client learning, that can then be used to link client learning outcomes to more global impact outcomes, e.g., increase in client attendance at job interviews, because of increased client self-confidence because of fewer self-put-downs and more positive self-talk.

Cognitive Mapping (Thought Listing, Mind Mapping)

Thought Listing and Cognitive Mapping are two recently devised techniques for providing a record of client thinking patterns and how client thoughts change over time. In Thought Listing, people are given a stimulus question, such as the ones below.

- What are the most important elements contributing to your inability to find a job?
- What are the critical elements contributing to your problem?
- What would need to happen so that you felt in control of your career path?
- What sorts of characteristics does an assertive person demonstrate?
- What happens to help clients change in counselling?
- What are the most important characteristics of a good counsellor?

As can be seen in the above examples, the procedure can be used to track aspects of a client's problem situation or they can be used to track key elements of a counsellor's professional development. In either case, the person is simply asked to list all the thoughts that come to their mind in response to the question. It usually is best to impose a time limit of about 2 minutes, as this tends to give a more accurate picture of what the client really thinks, rather than the "party line" on the topic. It can be done with the client writing down the responses on a sheet of paper, or it can be done orally, with the counsellor writing down what the client says.

In Cognitive Mapping, the exercise is extended by having the client transfer the results of the thought listing to small post-it notes and then arranging the post-it notes on a sheet of graph paper so that they provide a picture of how the concepts are related in the person's thinking. The following detailed instructions were developed to help standardize the cognitive Mapping procedure.

Thought Listing/Cognitive Mapping - Instructions

1. Pass out stimulus sheet for Probe question.

   "A question is written at the top of this sheet of paper. I'm going to give you 2 minutes to write down everything that comes to your mind in response to the question. It will be easiest to complete the rest of this task if you have 1-2 word answers, not large sentences. Don't worry too much about whether you have the 'right' answers or the 'best' answers. Just give your immediate thoughts."

2. Pass out "Post-it" stickers

   "Now I want you to transfer each of the items on your transfer the items to stickers, 1 item per sticker"

3. Pass out laminated graph paper and Complete map
   (NOTE: There are 3 steps: To avoid confusion, *make sure all participants complete each step before giving the instructions for the next step.*)

   a. Arrange the stickers on the graph paper provided in a manner that indicates how the concepts they represent are related in your thoughts. If two concepts are related strongly, place their stickers close to each other. If they are related weakly, place their stickers further apart.

   b. Now, use the china marker to draw connecting lines between stickers that represent related concepts. You may rearrange stickers and lines until you are satisfied that what you have produced is a good representation of your understanding of these concepts and their relationships. A dry cloth, or tissue, is provided for use in altering marker lines.

c. Finally, use a different coloured marker and draw a circle around any clusters of concepts: i.e., concepts that seem to be part of some larger concept, and label each circle you have drawn.

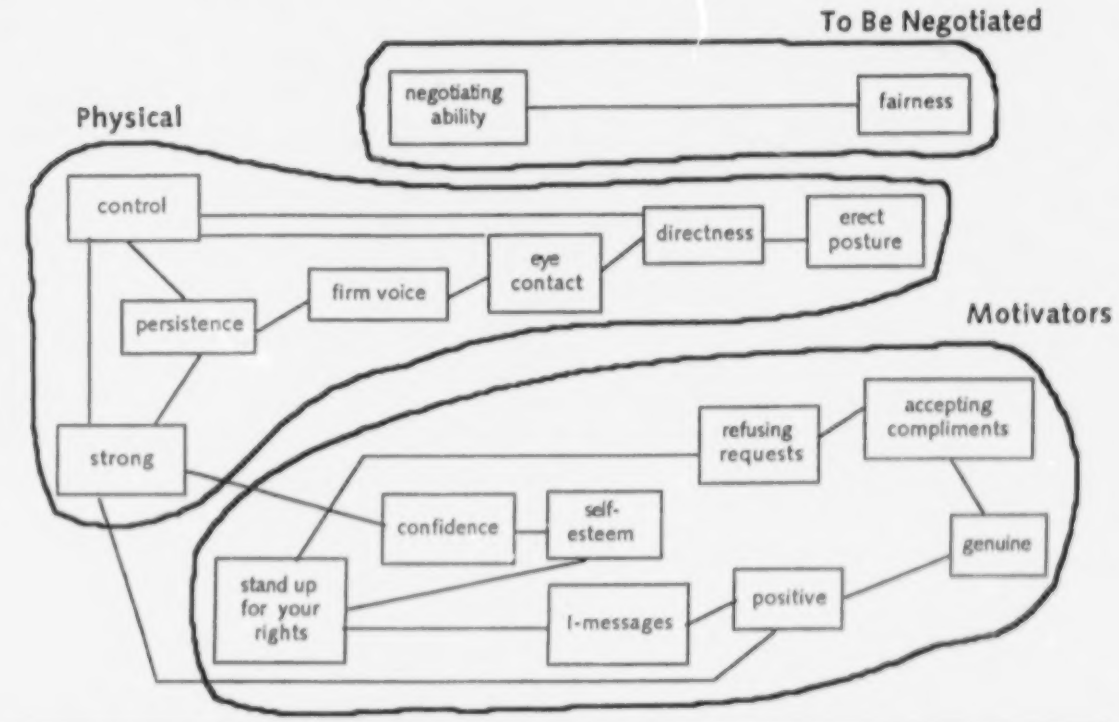
Quantitative Scoring Procedures for Cognitive Maps

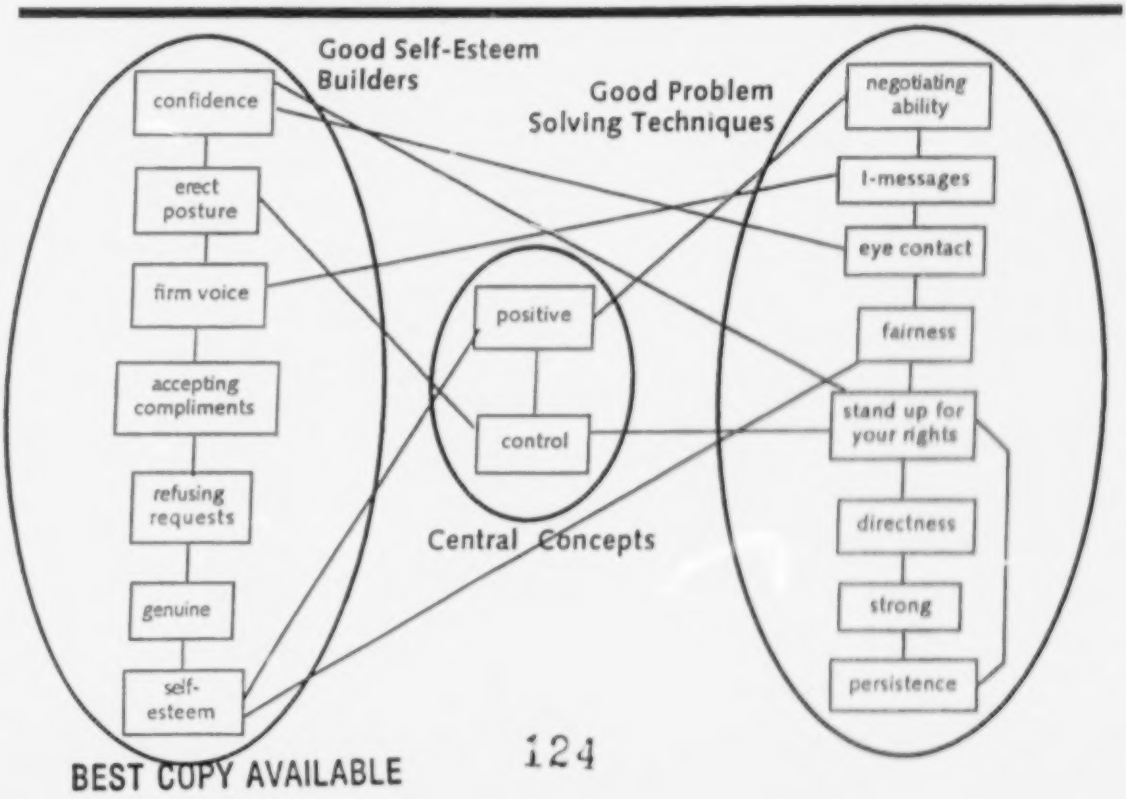
There are numerous ways of obtaining meaningful numbers that can describe changes in cognitive maps over time. Many of these can also be used to "score" client responses to thought listing questions. Some of the more common methods include:

1. extent = # of concepts generated in response to the initial question.
2. integration = # of links between concepts, i.e., # of lines joining two stickers
3. centrality = # of lines emanating from each concept (each concept or sticker has a centrality score and the most central or inter-connected concept may not be in the middle of the map)
4. diversity = # of clusters
5. personal involvement = # of self-referenced stickers + # of links emanating from those stickers
6. counsellor involvement = # of counsellor referenced stickers + # of links emanating from those stickers
7. affect = # of stickers containing feeling words, divided by the total # of stickers
8. empowerment = # of stickers containing references to self, divided by the total # of stickers
9. The format in #7 and #8 could be used with a variety of useful client dimensions, such as problem ownership, predominance of barriers, etc.

Cognitive Mapping can be used to provide evidence of client change in thinking during counselling. The example on the next page was produced by a client in an assertiveness training group. The counsellor leading the group was trying to help clients think assertively, in addition to learning the usual assertiveness skills. Using Cognitive Mapping, the counsellor was able to demonstrate that the clients who became the most assertive (as opposed to passive or aggressive) were also the ones who showed the greatest changes in the way they thought about assertiveness.

Cognitive Mapping Example: Change in client assertive thinking pre (top) and post (bottom)





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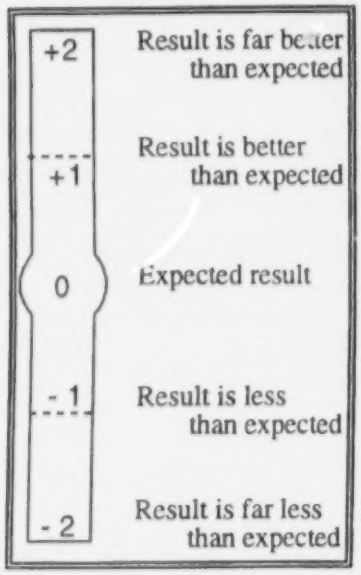
Goal Attainment Scaling

Goal Attainment Scaling was developed to help clients become more clear about what they were expecting to accomplish in counselling. However, it also offers an excellent way for measuring counselling outcomes. It has the advantage of creating a metric that can measure counselling effects across different clients, with different types of problems, and different problem situations.

Using Goal Attainment Scaling with a client usually involves the following steps:



1. Ask the client what he or she expects to gain from counselling. Help the client describe this result as an observable outcome (observable behaviour or a correlate such as an recording on a check list or observation grid). Label this result "0".
2. Next, ask the client to describe a result which, if it happened, would be far better than expected. It would be the sort of result which would lead the client to say "I was hoping that counselling would be worthwhile, but this far exceeds what I was hoping to gain." Label this result "+2".
3. Then, ask the client to describe a result that would be about half way between "0" and "+2" and label this "+1".
4. Now, ask the client to describe a result which, if it happened, would be far less than expected. It would be the sort of result which would lead the client to say "I wasn't sure if counselling would be worthwhile, but this is far worse than I ever expected." Label this result "-2".
5. Finally, ask the client to describe a result that would be about half way between "0" and "-2" and label this "-1".

For many clients, "-1" represents "staying the same" or "having no change in the situation that led them to seek counselling", and "-2" represents "the situation gets worse." This means that most clients come to counselling expecting to see a positive result. Goal Attainment Scaling helps to make sure that counsellor and client are both clear about the nature of the change the client is seeking and that the client's expectations for counselling are realistic.

Sometimes clients find that their "far better than expected" result is achieved part way through counselling, but they now see even more room for improvement than they thought possible in the beginning. In these cases it is possible to create a new scale to reflect the changed expectations: the original "+2" typically would become "0" on the new scale, and new "+1" and "+2" descriptors would be developed.

Agencies that use Goal Attainment Scaling for all their clients can calculate a summary performance indicator be simply averaging the results across all the clients they see. This makes a convenient way of looking at general agency performance.

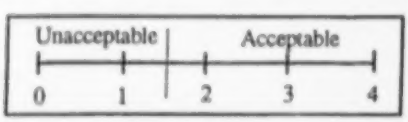
Client Outcomes Summary Chart

This check list is provided to summarize the client outcomes associated with your agency. The outcomes should be consistent with your mandate and negotiated with your funders, then listed on the form below. There should be a high level of agreement between the outcomes listed on this form and the ones that are listed on the "Reporting Procedures Check List" on page 1.

Client Outcomes Summary Chart	Indicate %	Rating 0	1	2	3	4
Clients completing program						
Full-time employment						
Part-time employment						
Contract employment / self-employed						
Completed intervention and seeking employment						
Self-sufficient						
Not seeking work						
Referral for further training - skill training						
Referral for further training - academic training						
Referral for further training - language training						
Referral for further training / alternate program						
Other referral						
Other outcomes (please list)						
Unable to contact						

Please use a two-step process. **(A)** decide if the skill use is **Acceptable** or **Unacceptable**, then **(B)** assign the appropriate rating:

0 = the performance is very poor
1 = the performance is poor
2 = the performance is minimally acceptable
3 = the performance is good
4 = the performance is outstanding



Appendix B

Types of Evaluation Instruments

Appendix B
TYPES OF EVALUATION INSTRUMENTS

Questionnaires/Check Lists

In constructing a questionnaire, it is important to select the smallest number of questions that can give you the results that you want. There are two main types of questions, "Restricted Alternatives" or "Open Ended".

Restricted Alternative Questions specify alternative responses among which the respondent must chose. There are several types.

a) Binary alternatives (such as: Yes/No, True/False, Useful/Not Useful, Relevant/Not Relevant) work best when the information you want is factual or you want to verify how the respondent would assess a particular situation.

b) Likert scale alternatives (such as: "Strongly Disagree" ..."Strongly Agree") allow respondents to provide a more differentiated rating response to items. If your scale has four options, then respondents are forced to take a side. If your scale has three or five options, then respondents may select a neutral middle option. In general, respondents find it difficult to differentiate reliably among more than five options.

c) Multiple choice questions ask respondents to choose among several different alternatives. They provide more information about the respondent's experience and work well as long as the alternatives are mutually exclusive.

d) Multiple response questions list a number of non-mutually-exclusive alternatives and permit the respondent to select more than one.

e) Rank ordering alternatives forces respondents to indicate their degree of preference for various options.

"Restrictive Alternatives" questions are the easiest for respondents to answer and are the easiest to score and report.

"Open-ended" questions provide an opportunity for respondents to generate a response without restriction. They require more effort on the part of the respondents and should only be used with respondents who are strongly motivated to complete the questions.

Questionnaires are easiest to answer if the questions are grouped together by theme and arranged in an order that will appear logical to the respondent. In general, impersonal identification data should go at the beginning, while questions calling for personal feelings and attitudes should go at the end.

Once the responses to open-ended questionnaires are collected, their content needs to be analyzed using content analysis techniques. This involves reading a sampling of the responses, seeing how the responses naturally group together into common themes, and developing categories into which individual responses can be placed based on the natural groupings. Once the categories have been developed, all the questionnaires can be coded and frequency counts can be made of the number of responses falling into each category.

Interviews

Interview evidence is sometimes thought to be the easiest to collect; however, there is a substantial amount of work in organizing and interpreting the results of interview evidence. The responses to all interviews need to be recorded, a content analysis of the responses needs to be completed, and a categorization system needs to be developed that reflects the interviewee's responses. The ease with which these tasks can be completed is directly related to how structured the interview protocol is. A very structured protocol may be in essence a questionnaire that is administered orally, while an unstructured interview will begin with an initial question and then follow the respondent's comments.

Observation Grids

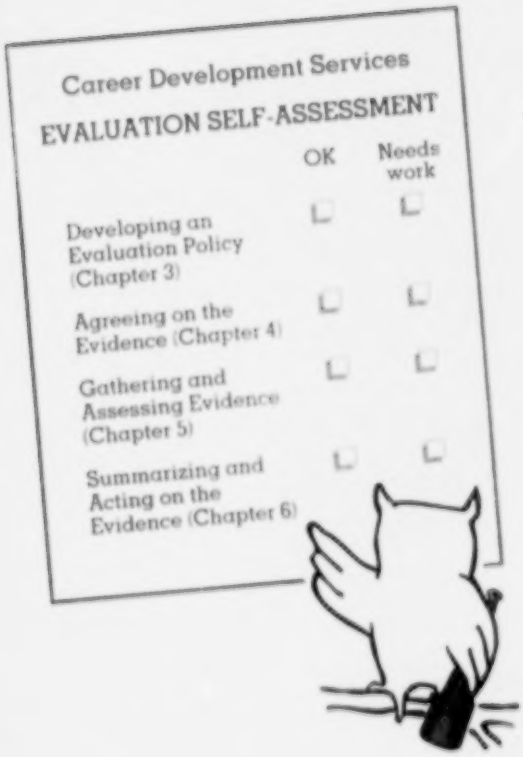
Observations grids are ways to systematically organize specific aspects of service provider or client behaviour. They can take the form of home practice logs, check lists to record in-session practice, or structured protocols to record trained judge's interpretations of video tapes. Several examples of observation grids appear in Appendix A. Such observation grids provide useful evidence of counsellor or client intervention adherence as well as client change across time.

Practice/Time Logs

Practice logs facilitate the recording of activities, experiences, or feelings on a regular and systematic basis. They can be structured for use by participants, counsellors, or evaluators and can be an excellent method for tracing and evaluating change over time. If the log is anonymous, participants will usually provide a good deal of very specific feedback. It often is useful to structure the log by providing specific questions for participants or service providers to address, or specific types of impressions that should be noted. This helps prevent the log from becoming simply a diary, in which everything that happens in a persons's life is recorded. If the amount of detail required in the log is excessive, participants may find it difficult to sustain their motivation over a long period of time. Because of the range of responses that may be recorded, analyzing the results may be quite time consuming. Content analysis procedures are often employed in analyzing evidence acquired from logs.

Personal Monitoring

Personal monitoring, or self-monitoring, has been demonstrated to be an important addition to most interventions. Participants usually find the results of self-monitoring to be very motivating. Further, service providers can use self-monitored evidence to attest to client program adherence, as well as client learning and impact of intervention. Although occasionally, participants make mistakes with their self-monitoring, and sometimes even "fake good" or "fake bad", for the most part, research has shown that self-monitoring data is trustworthy and is a good indication of what the client actually is doing. Appendix A contains several examples of how self-monitoring can be used to obtain evidence of a wide variety of counsellor and client behaviour, ranging from motivation level, to various affective states, to internal variables such as self-talk, to observable behaviours. The versatility of self-monitoring makes it an extremely important component of most evaluation programs.


Career Development Services
EVALUATION SELF-ASSESSMENT
OK
Needs work
Developing an Evaluation Policy (Chapter 3)
Agreeing on the Evidence (Chapter 4)
Gathering and Assessing Evidence (Chapter 5)
Summarizing and Acting on the Evidence (Chapter 6)

Demonstrating Value

A Career Development Services Evaluation Workbook

DEMONSTRATING VALUE is a user-friendly, self-instructional resource to help organizations systematize their approach to evaluation so that it meets the needs of all their stakeholders, including clients and counsellors. This workbook is structured around a four-stage process that legitimizes and builds on the "informal" evidence clients and counsellors already collect, and provides a time-efficient approach to documenting and communicating how well services are being provided.

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